Wiland
DELIVERING THE FUTURE®

Data Contribution Foundation for Success

Welcome!

The Data Contribution Guidelines that follow have been established to assist you in providing data to us in a way that will maximize the many benefits of participating in the Wiland Cooperative Database.

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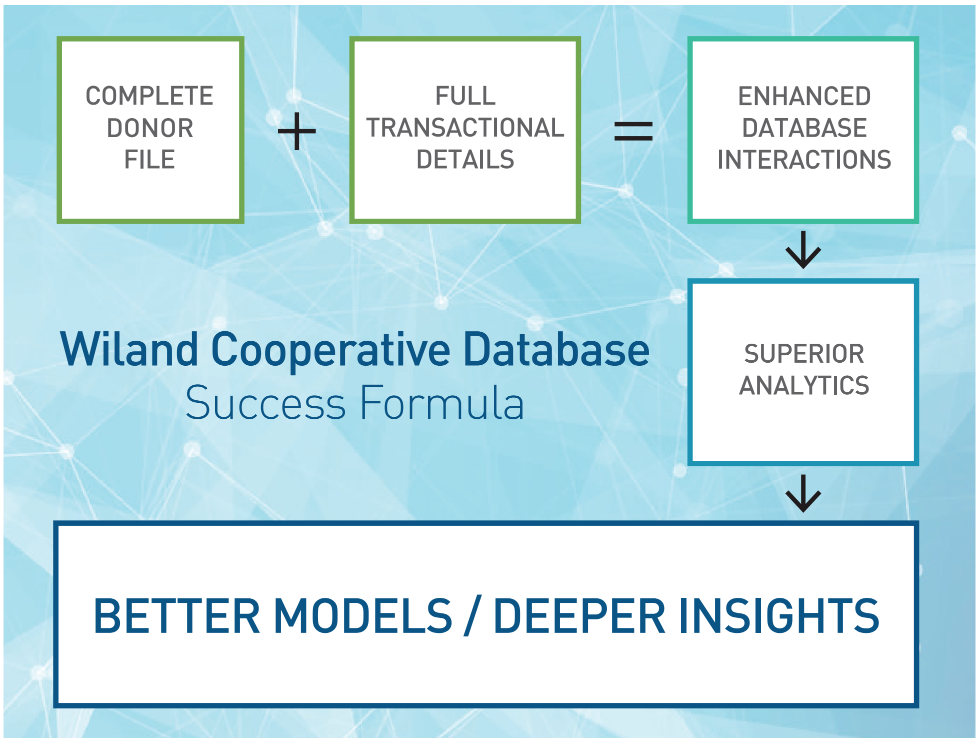
An important key to maximizing ROI from your participation is providing comprehensive data, full transactional details, and frequent updates.

In addition to providing format and file transmission instructions, this document offers guidance on specific data elements that should be supplied. Simply stated, the more data you provide, the more details that you include, and the more frequently you update your data, the better you will be served by our predictive modeling capabilities.



Please note that we can often use the same files/formats that you are already using for similar purposes, as long as the required data is included. **Please provide us with translations/definitions for all fields, codes, and values supplied so that we can properly load them to maximize modeling success and reporting accuracy.**

Your Client Services Director or New Business Development Executive will be happy to walk you through these guidelines or answer any questions you might have about data layouts, formats, or transmission.

Thank you!

Data Contribution Guidelines

I. Data Format and File Transmission

A. Data Format

Please provide files in **ASCII** format. While **fixed-length fields** are preferred, we can also accommodate delimited records (comma-delimited, tab-delimited, etc.). For efficient transfer, please **compress files** using a zip application, such as WinZip or PKZip.

B. Data File Identification

To ensure that data files are accurately identified and processed by Wiland in a timely manner, please follow these guidelines:

- Submit each data file type (donor file, transaction file, etc.) individually
- Identify files using client name, date, and data file type
- Indicate if the file is an initial data feed or an update to existing data; if an update, indicate if it's a full replacement or an incremental update
- Send file layouts and any conversion tables used in populating specific fields for each file
- Send record counts for each file

C. File Transmission Methods

Wiland offers several methods for easy transfer of your data and for your ongoing updates:

1. **Preferred Method: Send files to the Wiland FTP site using an FTP client (such as WS_FTP).** Your Wiland Client Services representative will provide you with a secure logon.
2. **Use a web browser to upload files to the Wiland FTP site.** Your Client Services representative will provide you with a secure logon to access the FTP web interface.
3. **Utilize client or third-party FTP site.** You can post files for Wiland to retrieve.

NOTE: Although Wiland is able to handle FTP transmissions in any form, we strongly encourage you to utilize a secure FTP protocol, such as SFTP. If such a program is unavailable, we recommend the use of PGP to encrypt files prior to transmission. **Please do not send any donor information to Wiland by email.**

II. Data to Provide

To maximize success, please provide detailed **(A) Donor**, **(B) Donation**, **(C) Promotion**, **(D) Chapter**, and **(E) Consumer Opt-Out and Deletion Request** data (if applicable), as specified below, including all requested fields. By providing the requested detail you will be able to utilize the entire complement of Wiland products and benefit from the most powerful predictive modeling techniques and report insights available. All Wiland products and services are customized based on the foundation of data you supply.

We want to help you increase response rates, expand marketable audiences, gain valuable donor insights, increase revenue, and stimulate growth. To help us reach these objectives for you, please provide the Requested Data rather than just the Minimum Data whenever possible. It is also important that you provide regular, frequent data updates – at least monthly (as required in the Wiland Agreement), but more frequently when possible – to optimize your results.

Please do not send to Wiland any of the following types of data, even if you store such data and they fit into one of the categories requested:

- Financial account numbers or access codes (e.g., bank account or credit card numbers or PINs)
- Government identification numbers (e.g., social security or driver license numbers)
- Protected health information as defined by HIPAA or other sensitive individual health information as defined in industry self-regulatory guidelines such as those issued by the Direct Marketing Association or Digital Advertising Alliance
- Personally identifying information about children

A. Donor Data

Requested Data	Minimum Data Required	Data Update
All U.S. donors and housefile names, regardless of recency, along with complete contact information and donor-level attributes. Please send us all record types, including donors, inquiries, requestors, etc. This will enable you to benefit from Wiland's extensive suite of acquisition and housefile solutions.	**36-month donors.** Records should include full name and all available contact information, including full postal address and email, as specified below.	Indicate Replacement (full database file) or Update. Updates should include all donors with transactions since the previous update, along with all new housefile names.

1. Donor/ Non-Donor Contact Information (Use of punctuation should be avoided if possible):

Field	Description/ Examples
• **Donor ID**	Client's unique donor identifier; if there are multiple Donor IDs associated with donor, please provide all
• **Full Donor Name:**	
◦ Title	e.g., CEO, President, Treasurer
◦ Prefix	e.g., Mr, Ms, Mrs
◦ First Name	
◦ Middle Name	
◦ Last Name	
◦ Maturity Suffix	e.g., Jr, Sr, III
◦ Professional Suffix	e.g., DDS, MD, PhD
◦ Company Name	
• **Full Postal Address:**	U.S. records only; include all address lines, city, state, and ZIP
◦ Primary Address Line	
◦ Extra Address Line	Apartment number, suite number, etc.
◦ City	
◦ State Abbreviation	
◦ ZIP	
• **Email Address**	Used for matching, modeling, and digital linkage only
• **Primary Phone Number**	1st phone number for donor; used for matching and modeling only
• **Secondary Phone Number**	2nd phone number for donor; used for matching and modeling only

2. Donor/ Non-Donor Attributes (Clients should supply as many of the details below as possible):

Field	Description/ Examples
• **Email Opt-in Flag**	Y = Donor opted in to receive email offers from this client; used for client housefile modeling and reporting
• **Do Not Mail Postal Flag**	Y = Donor requested this client's offers not be mailed to this address
• **Do Not Rent Postal Flag**	Y = Donor requested others' offers not be mailed to this address
• **Donor Type Code**	Allows us to distinguish among various classes of donors. Suggested values (if providing different values, please include translations): R = Regular E = Employee P = Pending Receipt of Initial Scheduled Gift C = Corporate/ Business V = VIP/ Special Status N = Network/ Pledge Leader

• Membership/Loyalty/Rewards ID or Sustainer Flag	If there are multiple Membership IDs associated with the donor, please provide them all. Often memberships have different levels of access/benefits or terms; please provide level code if applicable. Please provide monthly or annual sustainer levels. If multiple programs (i.e., Memberships and Sustainers) are provided, please provide in separate fields and label clearly so that data can be properly utilized for modeling and report insights.
• Membership/Sustainer Start Date	CCYYMMDD format preferred
• Membership/Sustainer End Date	CCYYMMDD format preferred
• Inception Donation Date	Date of the donor's first donation; CCYYMMDD format preferred
• Inception Donation Chapter	Code or ID for chapter at which first donation was made
• Latest Donation Chapter	Code or ID for chapter at which latest donation was made
• Latest Activity Date	Applies to activities other than donations; CCYYMMDD format preferred
• Latest Activity Type	Especially important for non-buyer activities. Suggested values (if providing different values, please include translations): E = Email Signup/Update F = Referral/Warm Prospect V = Volunteer R = Requested Direct Mail Info P = Postal Addresss Update X = Suppression/Bad Address/Deceased
• Client Defined Fields	Any additional donor information that you think should be included

B. Donation Data

Requested Data	Minimum Data Required	Data Update
Last 10 years gift-level donation data, including date, donation type, gift amount, channel, chapter, payment method, and all other elements listed below. Detailed donation data improves modeling and report insights.	**Donations/gifts from the previous 36 months.** Include individual donation date and donation dollar amount.	Indicate Replacement (full database file) or Update. Updates should include all donors with transactions since the previous update.

Use of punctuation in data fields should be avoided if possible:

Field	Description/ Examples
• Donor ID	Used to link transactions to specific donor; if there are multiple Donor IDs associated with donor, please provide all
• Donation ID	Client's unique donation identifier
• Donation Dollar Amount	Dollars received or gross dollars pledged; 9999.99 format preferred
• Donation Type	Suggested values (if providing different values, please include translations): P = Donation/Gift Payment M = Membership Payment OR Sustainer Payment K = In-Kind Donation B = Estate/Trust Bequest L = Pledge Commitment/Future Gift (single pledge or installment/planned giving) F = Fulfillment of Pledge/Installment (must have Type L to associate with)
• Donation Date	CCYYMMDD format preferred
• Donation Channel	Channel through which donation was made. Suggested values (if providing different values, please include translations): I = Internet/Mobile Website M = Mail/Fax P = Inbound Phone H = Collected at Donor's Home C = Outbound Phone (Telemarketing) L = Submitted by Network Leader D = Direct at Chapter Office
• Payment Method	Suggested values (if providing different values, please include translations): CC = Credit Card CH = Cash CK = Check EF = EFT DC = Debit Card MO = Money Order PP = PayPal PD = Payroll Deduction

• **Payment Card Type**	Suggested values (if providing different values, please include translations): AE = American Express DC = Discover Card MC = MasterCard VS = Visa PB = This Organization's Branded Card PM = Multi-Organization Branded Card
• **Donation for Specific Fund**	Fund ID or Description
• **Credited Source Code**	Full campaign/offer source code; required to build response models
• **Credited Promotion Channel**	Marketing vehicle credited with driving the donation. Utilized in client digital campaign reporting and insights reporting. Suggested values (if providing different values, please include translations): D = Direct Appeal via Direct Mail E = Direct Appeal via Email G = Event or Gala (Fundraising, including Auctions, Lotteries, etc.) M = Ongoing Mass Marketing (Space Ads, Internet Paid Search, etc.) C = Direct Appeal via Telemarketing Call I = Individual/Door to Door (Fundraising/Pledge Drives) S = Specific Mass Marketing Appeal (Fundraising, TV Pledge Drives, etc.) W = Workplace (Organization Sponsored)
• **Premium Offer Identification**	Description (or ID) of premium that was included as part of the appeal, either front-end or back-end.
• **Chapter ID**	Chapter identifier for this donation (if applicable)

C. Promotion/Mail File Data

Requested Data	Minimum Data Required	Data Update
Three or more promotion/mail files. Please include all elements listed below. Mail files, key/source codes, and associated responders are used for building response models.	**At least two promotion files** for response model development and validation.	We will request additional promotion files as needed to refresh models or build new ones to account for offer changes, seasonality, etc

Client promotion files are required for the development of response models, which utilize analytical techniques that are among our most powerful and effective. We strongly recommend the provision of three past promotion files that are at least 90% mature to maximize initial model strength and stability.

Promotion files should include the following data elements:

Field	Description/ Examples
• **Donor ID (if recipient is a donor or housefile name)**	Client's unique donor identifier; if there are multiple Donor IDs associated with donor, please provide all
• **Full Donor Name:**	
◦ Title	e.g., CEO, President, Treasurer
◦ Prefix	e.g., Mr, Ms, Mrs
◦ First Name	
◦ Middle Name	
◦ Last Name	
◦ Maturity Suffix	e.g., Jr, Sr, III
◦ Professional Suffix	e.g., DDS, MD, PhD
◦ Company Name	
• **Full Postal Address:**	U.S. records only; include all address lines, city, state, and ZIP
◦ Primary Address Line	
◦ Extra Address Line	Apartment number, suite number, etc.
◦ City	
◦ State Abbreviation	
◦ ZIP	

Field	Description/ Examples
• Email Address	Used for matching, modeling, and digital linkage only
• Campaign Source Code	Full campaign/offer source code; required to build response models
• Mail/Promotion Date	Date on which the offer/promotion was first mailed or distributed (not necessarily "in-home" date); CCYYMMDD format preferred

When providing promotion/mail files for campaigns that are at least 90% mature, the inclusion of the following data fields for credited responders is recommended:

Field	Description/ Examples
• Response Donation Date	The date on which the donor gave in response to the promotion; CCYYMMDD format preferred
• Response Donation Amount	The dollar value of the responder's gift; 9999.99 format preferred

D. Chapter Data (if applicable)

Requested Data	Minimum Data Required	Data Update
Key information for all past, current, and planned chapters, as specified below. Chapter Data files should include Chapter ID numbers for all chapters for which there is an associated transaction in the Donation File.	Key Information for current chapters, as specified below.	Updates or replacements should include all chapters occurring in transaction updates.

To maximize success and enable certain client reporting, clients who have physical chapter locations should provide as many details about each location as possible, including:

Field	Description/ Examples
• Chapter Identifier	Client's unique chapter code, identifier, etc.; must match Chapter ID in Donation Data
• Chapter Name	Used in certain client reporting
• Chapter Region Code	e.g., Outlet vs. Full Retail, Store Size designation
• Chapter District Code	2nd level of chapter hierarchy (if necessary).
• Chapter Division Code	3rd level of chapter hierarchy (if necessary).
• Chapter Open Date	CCYYMMDD format preferred
• Chapter Close Date	CCYYMMDD format preferred
• Store Full Postal Address	U.S. stores only; include all address lines, city, state, and ZIP
◦ Primary Address Line	
◦ Extra Address Line	Suite number, etc.
◦ City	
◦ State Abbreviation	
◦ ZIP	
• Chapter Manager/Signatory Name	Used in certain client reporting
• Chapter Manager/Signatory Email Address	Used for delivering certain chapter-specific reports

E. Consumer Opt-Out and Consumer Deletion Request Data

Requested Data

- Please send information through the secure FTP process that is in place for current file transfers
- Please use a file name that clearly indicates the file has consumer opt-out and/or consumer deletion requests
- Please provide all the below information that you have for the donor (if the request applies to multiple donor IDs, send the details below for each)

Field	Description/Examples
• **Donor ID**	Client's unique donor identifier; if there are multiple Donor IDs associated with donor, please provide all.
• **Full Donor Name:**	
◦ Title	e.g., CEO, President, Treasurer
◦ Prefix	e.g., Mr, Ms, Mrs
◦ First Name	
◦ Middle Name	
◦ Last Name	
◦ Maturity Suffix	e.g., Jr, Sr, III
◦ Professional Suffix	e.g., DDS, MD, PhD
• **Full Postal Address:**	U.S. records only; include all address lines, city, state, and ZIP
◦ Primary Address Line	
◦ Extra Address Line	Apartment number, suite number, etc.
◦ City	
◦ State Abbreviation	
◦ ZIP	
• **Donor Email Address**	
• **Donor Phone Number**	
• **Consumer Opt-Out**	Y = Donor has requested to Opt Out of the sale and sharing of their personal data for third-party business purposes. Also known as a Do Not Sell request.
• **Consumer Delete**	Y = Donor has requested to Delete their personal data. Also known as a Deletion request.