UNDERSTANDING THE CODING SYSTEM

November 17, 2011

**CURRENT (ACTIVE) CODES**

|  |  |  |
| --- | --- | --- |
| **TYPE** | **STATUS**  | **APPLIES TO****DISPOSITION** |
| Bradley Grant | Active Grant | Approved |
| Bradley Grant | BP Selector Grant | Approved |
| Bradley Grant | Cancelled | Approved |
| Bradley Grant | Closed Grant | Approved |
| Bradley Grant | Combined | Declined |
| Bradley Grant | Deferred | Pending |
| Bradley Grant | Discussion Item | Pending |
| Bradley Grant | Gen. Cont. Cmte. | Pending |
| Bradley Grant | Grant Commitment | Approved |
| Bradley Grant | Hold | Pending |
| Bradley Grant | No Book Projects | Declined |
| Bradley Grant | O.M. | Declined |
| Bradley Grant | Other | All |
| Bradley Grant | Pending staff review | Pending |
| Bradley Grant | Preliminary | Pending |
| Bradley Grant | PRI | Approved |
| Bradley Grant | Request Withdrawn | Declined |
| Bradley Grant | Sent to Sand County | Declined |
| Bradley Grant | Special Dec | Pending |
| Bradley Grant | Staff-Dec | Pending |
| Bradley Grant | Staff-Recommend | Pending |
| Bradley Grant | Turned Down | Declined |
| Bradley Grant | Withdrawn | Declined |
|  |  |  |
| Bradley Prize | Prize 2012 | All |
| Bradley Prize | Prize 2011 | All |
| Bradley Prize | Prize 2010 | All |
| Bradley Prize | Prize 2009 | All |
| Bradley Prize | Prize 2003 | All |
| Bradley Prize | Prize 2005 | All |
| Bradley Prize | Prize 2006 | All |
| Bradley Prize | Prize 2007 | All |
| Bradley Prize | Prize 2008 | All |
|  |  |  |
| Donor Intent Program | Keiser | All |
|  |  |  |
| Program Related Investment | Active | All |
|  | Closed | All |
|  | Due | All |
|  | Loan Guarantee | All |

**REQUIRED CODES FOR ALL GRANTS**

**PROGRAM AREA** tells you which sector and sub-sector of the budget the grant is from. (Organization & Request Records – **one code required** in request record for each grant awarded)

 Ideas & Institutions

 Basic and Applied Research

 Bradley Prizes

 Higher Education

 Public Discourse

 Signature Grant

 Implementation & Impact

 Education

 Energy and Environment

 Equal Opportunity & Individual Liberty

 Family & Society

 Growth & Prosperity

 Law & Legal Reform

 Signature Grant

 IRA (Ideas to Results)

 Defend and Advance Freedom

 Education

 Employee Rights

 Human Dignity, Ordered Liberty, Civic Identity

 Philanthropy

 Signature Grant

 Legacy

 Capital

 Civic Growth & Prosperity

 Civic Identity

 Education

 Family & Society

 Signature Grant

**FUND CODE** refers to the type of grant or reason it was made. (Organization & Request Records – one code **required** in request record for each grant awarded)

 ’11-’12 Bradley Fellows

 BF Unassigned

 BP Selector Designated

 Bradley Prize

 Donor Intent Program

 General Contributions Cmte.

 Grant Commitment

 Other

 Program Related Investment

 Regular

**POPULATION SERVED** indicates if the grant should be included in the annual reports. (Organization & Request Records – **one code** **required** in request record for each grant awarded)

 AR – include in Annual Report only

 NO – do not include in either report

 WI – include in Report to Wisconsin and Annual Report

**REQUIRED CODES FOR ALL DECLINATIONS**

Used for Request Status and Declination Reason fields, these classifications indicate the reason for declination. (Request Records – one code each for status and reason required.)

 Combined (place ID# in reference field of the request combined with)

 No Book Projects

 Sent to Sand County

 Other

 Out-of-Mandate (negative response to an inquiry)

 Turned Down (at Directors Meeting)

 Program Completed (refers to Bradley Prizes)

 Withdrawn

CONFLICT CODES represent directors affiliated with the organization. Select from list of director last names. Codes in the Organization Record are default codes when a new Request is created for the organization, but if the request was created before the affiliation was noted in the organization record, it is necessary to open the request record and add the code. (Organization & Request records – used only if needed) [See Director Affiliations Process in the Compliance section for further information.]

ETHNICITY CODES refer to Bradley Prizes. (Contact & Request Records – as needed)

 BP Winner

 Sent to Selection Committee

 Top 10

GEOGRAPHICAL AREA SERVED is self-explanatory. (Request Records)

 Africa

 Asia and Pacific

 Canada

 Russia & Central Europe

 Central/Latin America

 Middle East

 Not Applicable

 Other

 Unassigned

 United States (not WI)-reminder WI grants are separated out

 Western Europe

 Wisconsin

 Milwaukee

INTERNAL PROGRAM refers to tax situations and differing grant requirements. (Organization & Request Records – select as needed; most will be Regular Grant)

 509(a)(3)-Type 3

 Bradley Prize

 Challenge

 Exp Resp – Foreign

 Exp Resp – New Org Applied to IRS

 Exp Resp – Possible Tipping

 Exp Resp – PRI’s

 Exp Resp – Private Foundation

 Exp Resp – Private Operating Foundation

 Foundation Initiative

 General Contributions Cmte.

 Matching

 Program Related Investment

 Regular Grant

TYPE OF SUPPORT states the general type of support the grant is for. (Request Records)

 Applied Research

 Archival Research

 Basic Research

 Book Project

 Bradley Prize

 Capital Construction

 Commissions

 Conferences/Lectures/Seminars/Workshops

 Curriculum Development

 Emergency

 Endowment

 Equipment

 General Operations/Program Activities

 Gifted Education

 Other

 Planning Study

 Public Education

 Publications

 Renovation/Preservation

 **Research/Teaching Fellowships** – used for Bradley Fellowships

 Student Exchanges

 Student Scholarships

 Visiting Scholars

ORGANIZATION TYPE defines the type of organization. (Organization & Request Records)

 Association/Professional Society

 Broadcast Media (TV/Rad/E)

 Church/Synagogue

 Community Service Agency

 Foundation

 Government

 Hospital/Medical Care Facility

 Library

 Miscellaneous

 Museum/Historical Society

 Performing Arts Group

 Policy Research Institute

 Print Media (Mag/Jrnl)

 Private University/College

 Public Affairs Organization

 Public University/College

 School (Other than University/College)

 Social Service Agency

 Think Tank

When coding, only codes currently in use are displayed. When running reports, all codes are displayed.