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| Bradley Grant | Request Withdrawn | Declined |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| Bradley Grant | Withdrawn | Declined |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.