



# YAF Codes & Abbreviations

The following are codes and abbreviations you may see in correspondence or reports you receive.

**Annual Campaign/Gift Codes (these codes indicate someone's class/or school, the agent group/he/she is solicited with; the code is also attached to the gift when it is processed to assure correct crediting):**

A09U1976***98:	A	09	U	1976		98
	Annual	fiscal year	U for Yale College	class		agent group
A09S1970DRA98:	A	09	S	1970	DRA	98
	Annual	fiscal year	Grd/Prof Sch	class	Drama School	agent group
A09SFRENGRD02:	A	09	S	FREN	GRD	02
	Annual	fiscal year	Grd/Prof Sch	Dept.	Grad Sch	agent group
A09P2001*SM91:	A	09	P	2001	SM	91
	Annual	fiscal year	Parents	Child's class	College	agent group

**Yale College Volunteer Affiliations and Roles within the Yale Alumni Fund:**

*For other information on Agents and Chairs with regards to codes, you may refer to the distributed document called "Managing & Understanding the Coding of Volunteers (Alumni, Students)."*

Chair of Agents	Likely one chair or (co-chair) per class; he/she oversees the agents; communicates solicitation schedule and figures with agents; likely authors one or two solicitation letters to the prospects per year
Agent	Likely 10-20 agents per class; authors solicitation letters to prospects in their agent group and makes follow up calls to prospects; sends thank you notes to donors

**Common Agent Group Codes with typical definitions of usage**

**(you would see this at the end of the campaign code i.e. A09U1976\*\*\*98 is for agent 98)**

AgentXX	The number that is at the end of a campaign code represents the Agent group can be any two digit number that corresponds with an Agent name.
Agent 97	Consists of prospects who are not assigned to an Agent. These prospects likely get Chair's letter with a scanned signature.
Agent 98	Known as the Chair's group, it consists of a combination of friends and others who the Chair may not personally know. These can be donors who are placed there to get high level personal attention (i.e. letters) because they are identified as intensive prospects with ability and/or inclination to give.
Agent 99	Consists of prospects whose main method of solicitation is via the Phone Program (and direct mail). These prospects could also get Chair's letter with a scanned signature.

**Other abbreviations you'll see:**

NHA refers to the Nathan Hale Associates Program that recognizes leadership annual giving.

QCF refers to the Quarter Century Fund which relates to pledges begun when alumni were seniors at Yale and pledged gifts over 25 years (applicable up to & including the Class of 1996).

SCG refers to the Senior Class Gift.

CSF/AAP/YYC/LGC/SCA – these are all solicitation methods that are associated with a gift to indicate the way in which they responded [e.g. CSF – donor responding to Chair's First/Kickoff Ltr]. Solicitation codes can be found in BERT Reference.



# YAF Codes & Abbreviations

## Mail rules & other codes to consider:

*NOTE: Those marked with a \* in the 'Applied by' column indicate the staff's responsibility to make a relevant entry under the prospect's Annual Giving Comments in BERT or as a Contact Entry. Any reference in the right column to a 'Staff Decision' indicates the involvement of the Development staff listed to the left (Applied by) and should be determined on a case-by-case basis.*

### Codes Closely Relevant to the Person or Their Record

Code	Definition	Applied by Which Staff	Staff Decision (SD) or At Request of Alum (AR)
D	Deceased (notified directly or have seen obituary) (This is a person Status not a mail rule.)	Alumni Records	SD based on notification
RD	Reported deceased (we have heard indirectly so it's considered unconfirmed)	Alumni Records	SD based on notification from a 3 <sup>rd</sup> party
BA	Bad address/no known address	Alumni Records	SD based on returned mail
IF	Imaged file (documentation has been scanned)	Central Files (S. Rapino)	SD (ongoing process and coding)

### Codes Closely Related to Solicitations & Mail

Code	Definition	Applied by Which Staff	Staff Decision (SD) or At Request of Alum (AR)
NS	No solicitation of any kind - emails, mail, or phone calls	Development Officer (or Assistant)*	AR based on commentary; should be applied with care since this excludes the donor from any/all solicitations
EF	Does not want fundraising email	Development Officer (or Assistant)*	AR based on commentary
EO	Wants to be solicited via email only	Development Officer (or Assistant)	AR based on commentary
NY	No Yale Alumni Fund email	Development Officer (or Assistant)*	AR based on commentary and likely usage of the word "unsubscribe" in an email
NE	No email ever	Alumni Records	AR based on commentary
NA	No mail (administrative) - does not want to receive Yale mail of any kind [code is seldom used and is based on Office of Development determination]	Alumni Records	SD based on commentary
NM	No mail by request	Alumni Records	AR based on commentary
GJ	Graduate joint solicitation (grad couple solicited as one)	Development Officer (or Assistant)	AR based on response to inquiry
JR	Joint Solicit Refuser: A couple does not want to be solicited together	Development Officer (or Assistant)	AR based on response to inquiry
JS	Joint solicitation (couples solicited as one)	Development Officer (or Assistant)	AR based on response to inquiry
1A or 1I	Nathan Hale Associates leadership giving – 1A indicates staff sees "potential" for NHA giving; 1I indicates that an NHA brochure was sent	Development Officer (or Assistant), ADTech	SD based on giving histories



# YAF Codes & Abbreviations

## Codes Closely Related to Volunteers & Their Prospects

Code	Definition	Applied by Which Staff	Staff Decision (SD) or At Request of Alum (AR)
IP	Intensive Prospect (mail rule placed on prospects who likely should receive personal attention from a volunteer) [an older code]	Development Officer (or Assistant)	SD
IT	Intensive Agent (mail rule applied to all Agents when they volunteer)	Development Officer (or Assistant)	SD
OF	Volunteer is registered for password-protected online agent statements and online resources	Development Officer (or Assistant)	AR based on commentary or response to inquiry
RG	Member of Reunion gift committee	Development Officer (or Assistant)	SD based on involvement
RP	Reunion Gift Prospect in Reunion Year	Development Officer (or Assistant)	SD based on involvement
TA	Top Annual Prospect [an older code]	Development Officer (or Assistant)	SD based on leadership giving (or potential for)
U	Unable: this donor is unable to donate in a particular year(s) signified by the number following the U (ex. U8 for A08 2007/08 FY)	Development Officer (or Assistant)*	SD/AR based on commentary or correspondence with alum, could be due to unemployment, illness in the family, used for opinionated responses to campus news to avoid awkward mail
YS, there is an omit like this for each School	YS is the omit for Yale College (individual may have multiple affiliations with Yale and doesn't want to be solicited for a Yale College gift), the codes per School leave the alum out of the solicitations for that particular School	Development Officer (or Assistant)*	AR based on commentary

## Codes Closely Related to Phone Calls

NP	No phone calls of any kind	Development Officer (or Assistant)	AR based on commentary
NT	No Telefund calls from the Phone Program student callers	Development Officer (or Assistant)	SD/AR based on commentary during call
2A-2O, R1-RO, V1-V6 (one per school)	Phone Program Refuser A06/A07 & A07/A08	AdTech programming	SD/AR outcome of phone call determined by commentary by alum during call
MX-MZ, N0 – N9 (one per school)	Phone Program Consistent Non-Pledge Payer	AdTech programming each Dec. after write-offs	Non Pledge Payers are defined as those who did not pay two Ph Pgm pledges made within the last three years; the two pledges don't have to be consecutive within that time period.
PC	Phone Program – Yale Tomorrow Reunion/Annual Calling for MYP commitment	Development Officer (or Assistant)	SD (code used for the first time in A08)



# YAF Codes & Abbreviations

## Common Giving Codes (gift types/campaign codes that are put to a gift when it's processed)

NP	New pledge
PP	Pledge payment
GF	Outright gift
MYP	Multi-year annual pledge (also recognized in the system as codes beginning with a Z as ZMYP)

7/1/97 – 6/30/04\*\*

Yale Tomorrow (New Campaign beginning) 7/1/04\*\*

Note: Annual campaign codes begin with A... (see beginning of this document)

BCG: Bequest capital gift	BRG: Bequest gift
GCG: General capital gift (donor not rated 1-5; the code includes School/Class/Dept., i.e. GCGU1976 or GCGS1980SOM)	See below for new breakdowns
MCG: Major capital gift; the code includes georegion i.e. MCG2300 (2300 stands for NYC)	MRGgeocode: Major Gift (rated 2-5)
PCG: Principal capital gift	PRG: Principal Restricted Gift (rated 1-2)
GCG: General capital gift (donor not rated 1-5; the code includes School/Class/Dept., i.e. GCGU1976 or GCGS1980SOM)	SRGgeocode: Special Restricted Gifts (rated 6-8)
GCG: General capital gift (donor not rated 1-5; the code includes School/Class/Dept., i.e. GCGU1976 or GCGS1980SOM)	URGschoo/class: Unrated Restricted gift
FCG: Friend Gift	FRG: Friend Restricted Gift
COR: Corporations	CPN: Corporations
FON: Foundations	FDT: Foundations
MISC: Other Organizations	ORG: Other Organizations

\*\*Campaign code information taken from the distributed document titled Yale University Office of Development Gift Codes (with a revised date shown as Aug. 2004, same doc available in BERT reference 6/2008).

## When using omit buttons in BERT, these exclude the following:

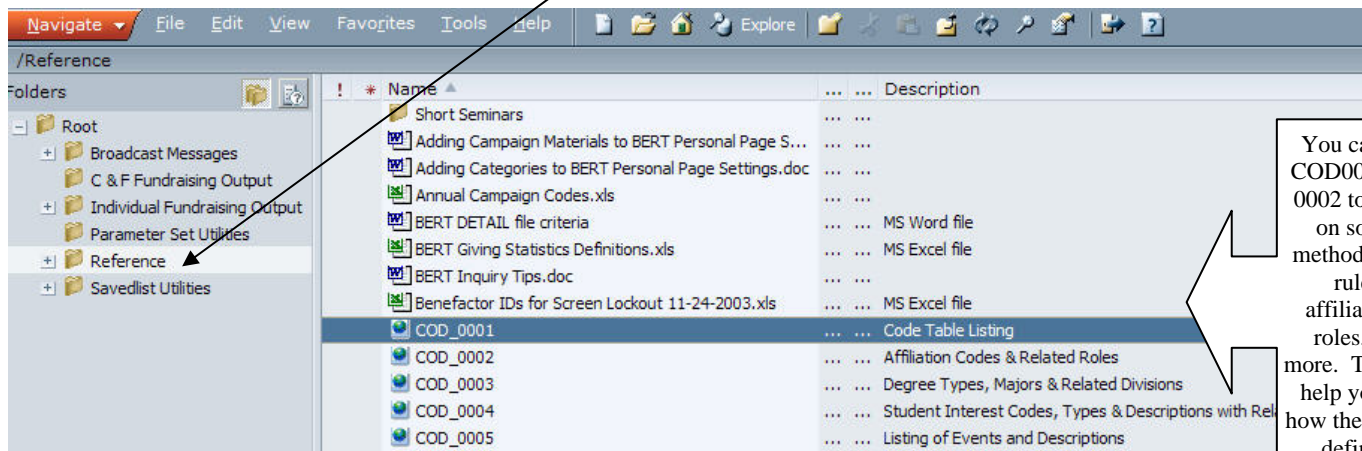
Omit Type	Description	Omit Criteria
FRSTANDARD	Fundraising Standard Omits	BA,NA,NM,NS,RD,U+CurrYr,CorpID
STANDARD	Standard Omits	BA,NA,NM,RD,CorpID

## Class Phonathon Omits exclude donors with the following scenarios/mail rules:

NP - No Phone	D - Deceased Status
NS - No Solicitation	U - Omit for Current Year Solicitation
BA - Bad Address	P - Purged Status
NM - No Mail	Rated 1.0
NA - No Administrative Mail	YC Non-Degree Non-Donors 1981-2000
RD - Reported Deceased	G&P Non-Degree Non-Donors 1981-2000
EO - Email Only	School Specific Solicitation Omit
JS - Joint Solicitation	Current Member of the Yale Corporation - K000
Current Year Annual Donor	No Phone Number
RP - Reunion Gift Prospect in Reunion Year	No Annual Campaign Code
RG - Reunion Gift Committee in Reunion Year	YC Non-Degree Prev 5 grad years
Foreign	G&P Non-Degree Prev 5 grad years

# YAF Codes & Abbreviations

How can you look up all of the Office of Development mail rules and other typical codes?



You can use COD0001 and 0002 to select on solicit methods, mail rules, affiliations, roles, and more. This will help you see how the code is defined.

## COD\_0001 Code Table Listing

### Parameter Collection Form

Enter new parameters below:

The following fields are specific for this process. Fields labeled in yellow

1. Printer Click PDF Icon On Output File To Print

2. Code Table Solicit Methods

3. Sort By  Code  Description

Clear Choices and Start Over

Run Process

Use the drop-down menu to select what you wish to see, and you can have them listed by code or description.

You can save the PDF (PDF thumbnail) or save it to Excel (the other thumbnail) by right-clicking and choosing "Save Target As".

07/23/2008 14:45

### Code Table Listing

#### Solicit Methods

Solicit Method	Description
AAP	Annual YC Agent Packet
AEL	Email LYBUNT/gift anniv.
AES	Alumni Employees Spring
AHE	Architecture High End Don
ALL	APRIL LAPSED LAW
AP	Parent Staff Phonathon
APE	Email Agent Packets
AR	Arch Phonathon
ARM	Annual Reunion Mailing
ASL	Agent second letters
AT	Art Phonathon