

## Guide to Search Ratings and Codes

### Gift Capacity Rating

Gift Capacity Rating is a code with a corresponding dollar value estimate defined as an individual's capacity to make a gift over five years to his or her favorite institution. The rating changes when you change the Match Quality Rating, manually update prospect information, or rescreen a record for updated information from our data vendors.

**TIP:** Search for prospects with a Gift Capacity Rating 1, 2, 3, or 4 at the EN Match Quality Rating to find new prospects within your database.

Gift Capacity Rating	Gift Capacity Estimate
1	More than \$10 Million
2	\$1 million to \$10 million
3	\$250,000 to \$999,999
4	\$100,000 to \$249,999
5	\$25,000 to \$99,999
6	\$10,000 to \$24,999
7	\$2,500 to \$9,999
8	Less than \$2,500
9	Insufficient Public Wealth Data
10	Not Yet Rated

### Major Gift Code

The Major Gift Code is a scale "A" through "E," with "A" rated prospects the strongest prospects for near-term major gift support. The Major Gift Code does not suggest any specific dollar value, rather a stronger or weaker propensity and financial capacity to make a major gift relative to the other members of your prospect pool. Many of the households with a Major Gift rating of A will be known to you already as significant past givers. The B and C-rated prospects, however, are excellent prospects for deeper relationship building in hopes of future major gifts.

**TIP:** Search for prospects with Major Gift Codes A or B with a Gift Capacity Rating 1, 2, 3, or 4 for your top prospects for near-term major gifts.

Major Gift Code		
A	0.5%	Strongest ↓ Weakest
B	1.5%	
C	3%	
D	10%	
E	85%	

## Annual Giving Code

The Annual Giving Code rates prospects on an ascending numeric scale (1 through 6). This rating identifies the best prospects to target for an annual giving effort. The Annual Giving Code combines the largest gift made to your organization with demographic data, lifetime giving history, and relationship/affiliation data to create a suggested yearly giving level.

**Tip:** Search for prospects with top Annual Giving Codes and Major Gift Codes B or C to help create an annual giving leadership pool to fuel your major gifts pipeline.

Annual Giving Code	Potential Gift Range
1	\$5,000+
2	\$2,500 to \$4,999
3	\$1,000 to \$2,499
4	\$500 to \$999
5	\$100 to \$499
6	Up to \$100

## Planned Giving Code

The Planned Giving Code, similar to the Major Gift Code, identifies those prospects with a strong capacity and disposition for a bequest or other deferred gift. Prospects are coded as “P” (Primary), “S” (Secondary), “T” (Tertiary), or “X” (Non-Prospect), with “P” being the highest level. Because of their affluence and neighborhood lifestyles, in addition to their ages, individuals coded as “P,” “S,” or “T” represent the best targets for deferred giving solicitation.

**Tip:** Search for Planned Giving Codes P or S and Major Gift Codes B or C who are not under management by a major gifts officer to create new planned giving prospect pools.

Planned Giving Code	
P	Primary
S	Secondary
T	Tertiary
X	Non-Prospect

## PRIZM® Cluster Code

The PRIZM® Lifestyle Segmentation is today’s most reliable and widely used consumer segmentation system. By segmenting residential areas according to ZIP + 6 postal geography, PRIZM® enables GG+A to precisely describe the lifestyles and socioeconomics of an individual’s household. There are 66 unique PRIZM® segments, coded 1 through 66. Each segment represents a unique set of socioeconomic behaviors and characteristics. Generally speaking, segment 1 (“Upper Crust”) is the most affluent, and as the segment number increases, the level of affluence decreases. GG+A has identified 7 segments that most strongly correlate with philanthropic giving (1, 2, 5, 6, 7, 9, and 10).

**TIP:** Search for prospects with top PRIZM codes combined with top Annual Giving codes to establish possible pools for testing segmented communications with messaging targeted to specific PRIZM codes.

<b>Top Philanthropic PRIZM® Segments</b>		
<b>01</b>	<b>Upper Crust</b>	The nation's most exclusive address, Upper Crust is the wealthiest lifestyle in America—a haven for empty-nesting couples over 55 years old. No segment has a higher concentration of residents earning over \$200,000 a year or possessing a postgraduate degree, and none has a more opulent standard of living.
<b>02</b>	<b>Blue Blood Estates</b>	Blue Blood Estates is a family portrait of suburban wealth: a place of million-dollar homes and manicured lawns, high-end cars and exclusive private clubs. The nation's second-wealthiest lifestyle, it is characterized by married couples with children, college degrees, a significant percentage of Asian Americans, and six-figure incomes earned by business executives, managers, and professionals.
<b>03</b>	<b>Movers &amp; Shakers</b>	Movers & Shakers is home to America's up-and-coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 and 54, often with children. Given its high percentage of executives and white-collar professionals, there's a decided business bent to this segment: Movers & Shakers rank number one for owning small businesses and having home offices.
<b>05</b>	<b>Country Squires</b>	The wealthiest residents in exurban America live in Country Squires, an oasis for affluent Baby Boomers who've fled the city for the charms of small-town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of executives live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis, and swimming as well as skiing, boating, and biking.
<b>06</b>	<b>Winner's Circle</b>	Among the wealthy suburban lifestyles, Winner's Circle is the youngest, a collection of mostly 25- to 34-year-old couples with large families in new-money subdivisions. Surrounding their homes are the signs of upscale living: recreational parks, golf courses, and upscale malls. With a median income of nearly \$90,000, Winner's Circle residents are big spenders who like to travel, ski, go out to eat, shop at clothing boutiques, and take in a show.
<b>07</b>	<b>Money &amp; Brains</b>	The residents of Money & Brains seem to have it all: high incomes, advanced degrees, and sophisticated tastes to match their credentials. Many of these city dwellers, predominantly white with a high concentration of Asian Americans, are married couples with few children who live in fashionable homes on small, manicured lots.
<b>09</b>	<b>Big Fish, Small Pond</b>	Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, belonging to country clubs, maintaining large investment portfolios, and spending freely on computer technology.

Top Philanthropic PRIZM® Segments		
<b>10</b>	<b>Second City Elite</b>	There's money to be found in the nation's smaller cities, and you're most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous executives who decorate their \$200,000 homes with multiple computers, large-screen TV sets, and an impressive collection of wines. With more than half holding college degrees, Second City Elite residents enjoy cultural activities—from reading books to attending theater and dance productions.

To learn more about PRIZM® segments go to <http://www.claritas.com/MyBestSegments/Default.jsp>

### Philanthropic Capacity Rating (PCR) Code

The Philanthropic Capacity Rating (PCR) is an overall rating of capacity and propensity. The PCR Code is derived from data such as income, age, home market value, PRIZM® segment, and a number of other demographic variables. The code was specifically designed to exclude giving for organizations that have prospects with no giving history but is customized to account for other client-supplied data that shows propensity to give. The prospects are ranked and then segmented into an appropriate number of PCR segments. The number of segments varies by institution, but is usually between 6 and 8. A “P1” indicates highest likelihood for inclination and capacity to commit to a major gift relationship.

***TIP:** Search for prospects with a top PCR code but a low Major Gift code to find new top prospects after you have exhausted your top Major Gift codes pool or to prioritize large population with no relationship history, such as new parents, ticket buyers, and patients.*

Philanthropic Capacity Rating Code	
P1	Most Likely
P2	
P3	↓
P4	
P5	
P6	
P7	
P8	Least Likely

### MSA Codes for Searches

Metropolitan Statistical Areas are coded geographical regions with one or more counties that contain a city of 50,000 or more inhabitants, or contain a Census Bureau-defined urbanized area (UA) and have a total population of at least 100,000 (75,000 in New England). MSA's are not limited by state lines. For example, the Philadelphia MSA includes the core and surrounding areas of Philadelphia, PA, Wilmington, DE, Atlantic City, NJ and areas of Maryland.

All DonorScape® records are tagged with an MSA code for the primary address submitted, and all records can be queried for their primary address MSA code.

**TIP:** Use MSA codes for regional event and travel planning purposes. For example, to pull prospects in the greater Boston area, you could run the following Advanced Search for the greater Boston area MSA and NECMA: Constituent Information > MSA> in > 1122,1123.

<b>Code</b>	<b>Metropolitan Area</b>
0040	Abilene, TX
0060	Aguadilla, PR
0120	Albany, GA
0160	Albany-Schenectady-Troy, NY
0200	Albuquerque, NM
0220	Alexandria, LA
0240	Allentown-Bethlehem-Easton, PA
0280	Altoona, PA
0320	Amarillo, TX
0380	Anchorage, AK
0450	Anniston, AL
0460	Appleton-Oshkosh-Neenah, WI
0480	Arecibo, PR
0500	Asheville, NC
0520	Athens, GA
0580	Atlanta, GA
0600	Augusta-Aiken, GA-SC
0640	Austin-San Marcos, TX
0680	Bakersfield, CA
0730, 0733	Bangor, ME
0743	Barnstable-Yarmouth, MA
0760	Baton Rouge, LA
0840	Beaumont-Port Arthur, TX
0860	Bellingham, WA
0870	Benton Harbor, MI
0880	Billings, MT
0920	Biloxi-Gulfport-Pascagoula, MS
0960	Binghamton, NY
1000	Birmingham, AL
1010	Bismarck, ND
1020	Bloomington, IN
1040	Bloomington-Normal, IL
1080	Boise City, ID
1122, 1123	Boston-Worcester-Lawrence, MA-NH-ME-CT
1240	Brownsville-Harlingen-San Benito, TX
1260	Bryan-College Station, TX
1280	Buffalo-Niagara Falls, NY
1303	Burlington, VT
1320	Canton-Massillon, OH
1350	Casper, WY
1360	Cedar Rapids, IA

<b>Code</b>	<b>Metropolitan Area</b>
1400	Champaign-Urbana, IL
1440	Charleston, SC
1480	Charleston, WV
1520	Charlotte-Gastonia-Rock Hill, NC-SC
1540	Charlottesville, VA
1560	Chattanooga, TN-GA
1580	Cheyenne, WY
1602	Chicago-Gary-Kenosha, IL-IN-WI
1620	Chico-Paradise, CA
1642	Cincinnati-Hamilton, OH-KY-IN
1660	Clarksville-Hopkinsville, TN-KY
1692	Cleveland-Akron, OH
1720	Colorado Springs, CO
1740	Columbia, MO
1760	Columbia, SC
1800	Columbus, GA-AL
1840	Columbus, OH
1880	Corpus Christi, TX
1890	Corvallis, OR
1900	Cumberland, MD-WV
1922	Dallas-Fort Worth, TX
1950	Danville, VA
1960	Davenport-Moline-Rock Island, IA-IL
2000	Dayton-Springfield, OH
2020	Daytona Beach, FL
2030	Decatur, AL
2040	Decatur, IL
2082	Denver-Boulder-Greeley, CO
2120	Des Moines, IA
2162	Detroit-Ann Arbor-Flint, MI
2180	Dothan, AL
2190	Dover, DE
2200	Dubuque, IA
2240	Duluth-Superior, MN-WI
2290	Eau Claire, WI
2320	El Paso, TX
2330	Elkhart-Goshen, IN
2335	Elmira, NY
2340	Enid, OK
2360	Erie, PA
2400	Eugene-Springfield, OR
2440	Evansville-Henderson, IN-KY
2520	Fargo-Moorhead, ND-MN
2560	Fayetteville, NC
2580	Fayetteville-Springdale-Rogers, AR
2620	Flagstaff, AZ-UT

<b>Code</b>	<b>Metropolitan Area</b>
2650	Florence, AL
2655	Florence, SC
2670	Fort Collins-Loveland, CO
2700	Fort Myers-Cape Coral, FL
2710	Fort Pierce-Port St. Lucie, FL
2720	Fort Smith, AR-OK
2750	Fort Walton Beach, FL
2760	Fort Wayne, IN
2840	Fresno, CA
2880	Gadsden, AL
2900	Gainesville, FL
2975	Glens Falls, NY
2980	Goldsboro, NC
2985	Grand Forks, ND-MN
2995	Grand Junction, CO
3000	Grand Rapids-Muskegon-Holland, MI
3040	Great Falls, MT
3080	Green Bay, WI
3120	Greensboro-Winston Salem-High Point, NC
3150	Greenville, NC
3160	Greenville-Spartanburg-Anderson, SC
3240	Harrisburg-Lebanon-Carlisle, PA
3280, 3283	Hartford, CT
3285	Hattiesburg, MS
3290	Hickory-Morganton-Lenoir, NC
3320	Honolulu, HI
3350	Houma, LA
3362	Houston-Galveston-Brazoria, TX
3400	Huntington-Ashland, WV-KY-OH
3440	Huntsville, AL
3480	Indianapolis, IN
3500	Iowa City, IA
3520	Jackson, MI
3560	Jackson, MS
3580	Jackson, TN
3600	Jacksonville, FL
3605	Jacksonville, NC
3610	Jamestown, NY
3620	Janesville-Beloit, WI
3660	Johnson City-Kingsport-Bristol, TN-VA
3680	Johnstown, PA
3700	Jonesboro, AR
3710	Joplin, MO
3720	Kalamazoo-Battle Creek, MI
3760	Kansas City, MO-KS
3810	Killeen-Temple, TX

<b>Code</b>	<b>Metropolitan Area</b>
3840	Knoxville, TN
3850	Kokomo, IN
3870	La Crosse, WI-MN
3880	Lafayette, LA
3920	Lafayette, IN
3960	Lake Charles, LA
3980	Lakeland-Winter Haven, FL
4000	Lancaster, PA
4040	Lansing-East Lansing, MI
4080	Laredo, TX
4100	Las Cruces, NM
4120	Las Vegas, NV-AZ
4150	Lawrence, KS
4200	Lawton, OK
4243	Lewiston-Auburn, ME
4280	Lexington-Fayette, KY
4320	Lima, OH
4360	Lincoln, NE
4400	Little Rock-North Little Rock, AR
4420	Longview-Marshall, TX
4472	Los Angeles-Riverside-Orange County, CA
4520	Louisville, KY-IN
4600	Lubbock, TX
4640	Lynchburg, VA
4680	Macon, GA
4720	Madison, WI
4800	Mansfield, OH
4840	Mayaguez, PR
4880	McAllen-Edinburg-Mission, TX
4890	Medford-Ashland, OR
4900	Melbourne-Titusville-Palm Bay, FL
4920	Memphis, TN-AR-MS
4940	Merced, CA
4992	Miami-Fort Lauderdale, FL
5082	Milwaukee-Racine, WI
5120	Minneapolis-St. Paul, MN-WI
5140	Missoula, MT
5160	Mobile, AL
5170	Modesto, CA
5200	Monroe, LA
5240	Montgomery, AL
5280	Muncie, IN
	Muskegon, MI (Replaced by 3000)
5330	Myrtle Beach, SC
5345	Naples, FL
5360	Nashville, TN



<b>Code</b>	<b>Metropolitan Area</b>
5483	New Haven/Bridgeport/Stamford/Waterbury/Danbury, CT
5523	New London-Norwich, CT-RI
5560	New Orleans, LA
5602	New York-Northern New Jersey-Long Island, NY-NJ-CT-PA
5720	Norfolk-Virginia Beach-Newport News, VA-NC
5790	Ocala, FL
5800	Odessa-Midland, TX
5880	Oklahoma City, OK
5920	Omaha, NE-IA
5960	Orlando, FL
5990	Owensboro, KY
6015	Panama City, FL
6020	Parkersburg-Marietta, WV-OH
6080	Pensacola, FL
6120	Peoria-Pekin, IL
6162	Philadelphia-Wilmington-Atlantic City, PA-NJ-DE-MD
6200	Phoenix, AZ
6240	Pine Bluff, AR
6280	Pittsburgh, PA
6323	Pittsfield, MA
6340	Pocatello, ID
6360	Ponce, PR
6403	Portland, ME
6442	Portland-Salem, OR-WA
6480, 6483	Providence-Fall River-Warwick, RI-MA
6520	Provo-Orem, UT
6560	Pueblo, CO
6580	Punta Gorda, FL
6640	Raleigh-Durham-Chapel Hill, NC
6660	Rapid City, SD
6680	Reading, PA
6690	Redding, CA
6720	Reno, NV
6740	Richland-Kennewick-Pasco, WA
6760	Richmond-Petersburg, VA
6800	Roanoke, VA
6820	Rochester, MN
6840	Rochester, NY
6880	Rockford, IL
6895	Rocky Mount, NC
6922	Sacramento-Yolo, CA
6960	Saginaw-Bay City-Midland, MI
6980	St. Cloud, MN
7000	St. Joseph, MO
7040	St. Louis, MO-IL
7120	Salinas, CA

<b>Code</b>	<b>Metropolitan Area</b>
7160	Salt Lake City-Ogden, UT
7200	San Angelo, TX
7240	San Antonio, TX
7320	San Diego, CA
7362	San Francisco-Oakland-San Jose, CA
7442	San Juan-Caguas-Arecibo, PR
7460	San Luis Obispo-Atascadero-Paso Robles, CA
7480	Santa Barbara-Santa Maria-Lompoc, CA
7490	Santa Fe, NM
7510	Sarasota-Bradenton, FL
7520	Savannah, GA
7560	Scranton--Wilkes-Barre--Hazleton, PA
7602	Seattle-Tacoma-Bremerton, WA
7610	Sharon, PA
7620	Sheboygan, WI
7640	Sherman-Denison, TX
7680	Shreveport, LA
7720	Sioux City, IA-NE
7760	Sioux Falls, SD
7800	South Bend, IN
7840	Spokane, WA
7880	Springfield, IL
7920	Springfield, MO
8000, 8003	Springfield, MA
8050	State College, PA
8080	Steubenville-Weirton, OH-WV
8120	Stockton-Lodi, CA
8140	Sumter, SC
8160	Syracuse, NY
8240	Tallahassee, FL
8280	Tampa-St. Petersburg-Clearwater, FL
8320	Terre Haute, IN
8360	Texarkana, TX-Texarkana, AR
8400	Toledo, OH
8440	Topeka, KS
8520	Tucson, AZ
8560	Tulsa, OK
8600	Tuscaloosa, AL
8640	Tyler, TX
8680	Utica-Rome, NY
8750	Victoria, TX
8780	Visalia-Tulare-Porterville, CA
8800	Waco, TX
8872	Washington-Baltimore, DC-MD-VA-WV
8920	Waterloo-Cedar Falls, IA
8940	Wausau, WI

<b>Code</b>	<b>Metropolitan Area</b>
8960	West Palm Beach-Boca Raton, FL
9000	Wheeling, WV-OH
9040	Wichita, KS
9080	Wichita Falls, TX
9140	Williamsport, PA
9200	Wilmington, NC
9260	Yakima, WA
9280	York, PA
9320	Youngstown-Warren, OH
9340	Yuba City, CA
9360	Yuma, AZ