Mother's Day 2018: User Documentation

R PROGRAMMING AND ANCHOR ASSIGNMENT

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Summary

For Mother's Day 2018 there are approximately 15,000 donors in this mailing: 10,000 from the house file and 5,000 from an acquisition list.

Generating Mailing Lists from House File

Raiser's Edge List

Select all donors who have made a cash contribution from 01/01/1990 to 45 days before the drop date of the upcoming mailing. Suppress all individuals who request no mail.

Navigate to **Query → DirectMailLists** in Raiser's Edge.
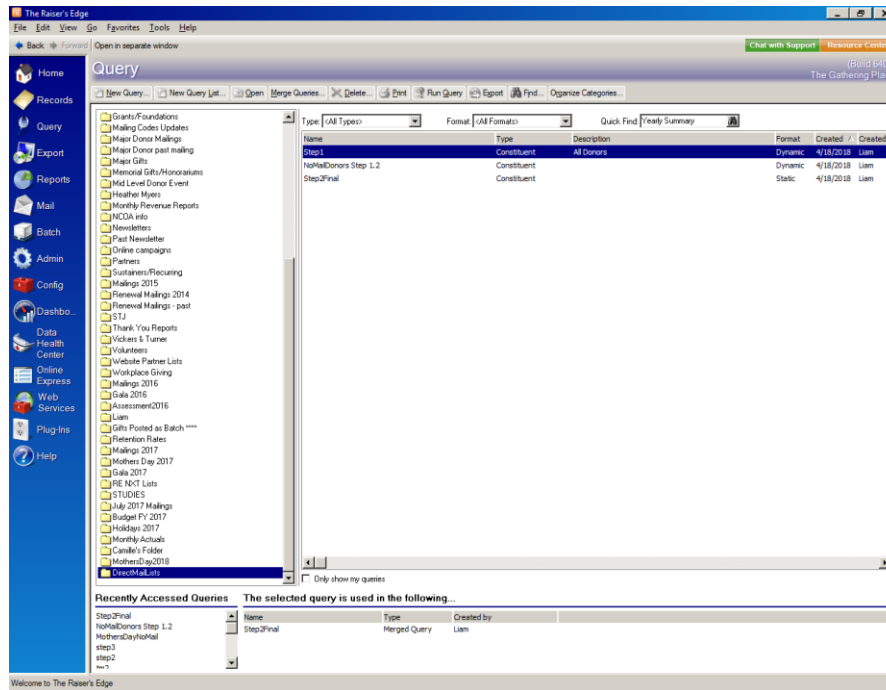
Select **Step1**. This query pulls every donor for a specified date range. Change the gift range to the dates TGP wishes to target. Click **OK.** Save the query and exit.
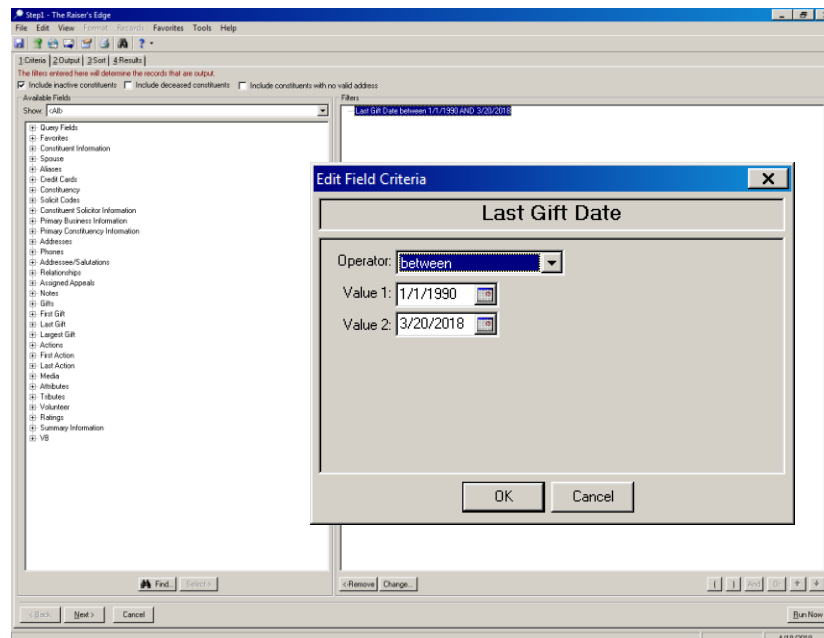
The query titled **NoMailDonors Step 1.2** pulls a list of all donors who have indicated that s/he does not wish to receive mail. It is best practice to open this query and verify the listing of those who do not wish to be contacted. For example, a donor may only wish to receive mailers two times a year, Mother's Day and the Holiday season. If it is July, this donor should not be included in the mailer, but if it is May, this donor should be included.

In the box on the left, **Solicit Codes**, list the codes the user **wants to include on the upcoming mailing**.

The box on the right should only include the solicit codes the users **wants to suppress** from the upcoming mailing.

Save and close this query.

Step1 and **NoMailDonors Step 1.2** queries are *dynamic* queries, meaning they are updated each and every time the user runs the query. The next step is to create a merge of these two queries, which will be in the *static* format. In order to create a new list of individuals, save a new query *every time*.

The final query, **Step2**, merges **Step1** and **NoMailDonors Step 1.2** by subtracting those in **NoMailDonors Step1.2** from **Step1.**

The primary query in this case is **Step1** and the secondary query is **NoMailDonors Step1.2**.
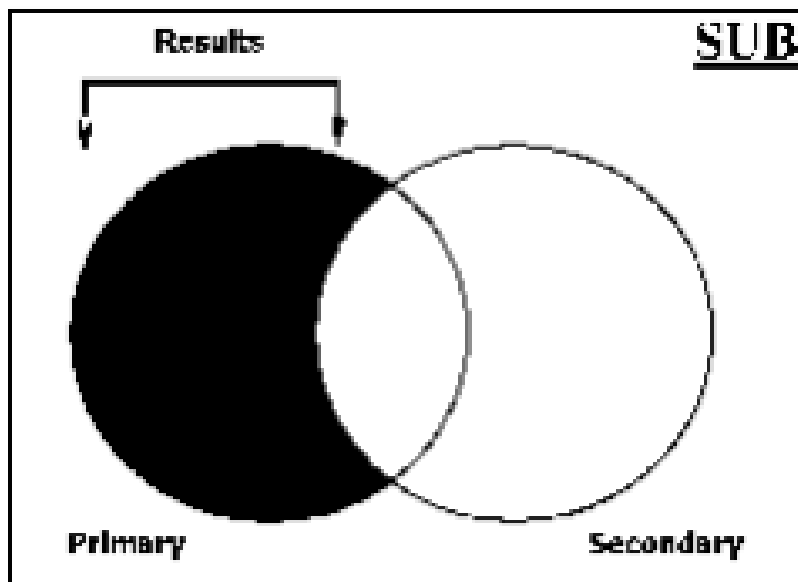
Select the **Step2Final** query, then **Save As** to a new query name. This writes the static query, and the user is now ready export the file to the location of the R project.

List Reduction and Appeal Code Assignment

Preliminary Steps

Navigate to the R document. It is in the S drive by the following path:
S:\█████████████████████████████
██████████████████████\Mom18. The user should create a new project for each mailing. This preserves historical data and reduces copy-paste errors.

Select **File → New Project**.

There are three options for the new project: new directory, existing directory, and version control. Select *new directory* to open a brand new project in a new location. Select *existing directory* to open a new project in an existing location.

Example: John has a folder where he develops all the necessary documents for direct mails. John should select *existing directory* to save the new direct mail document in the same folder.

Example: Sally wants to start a new process for acquisition lists. Sally should choose the *new directory* to begin her project.

For this, select **New Directory → New Project.**
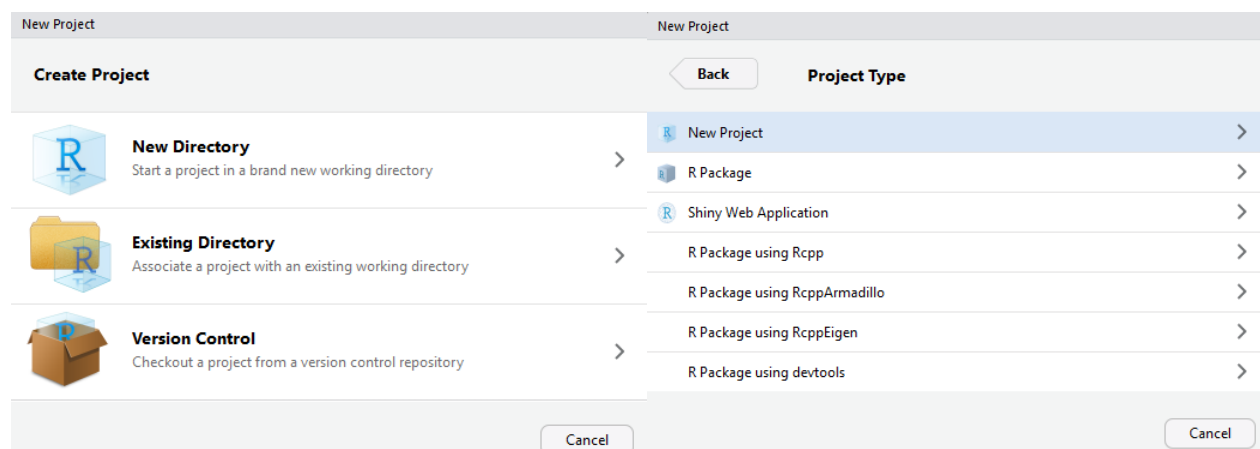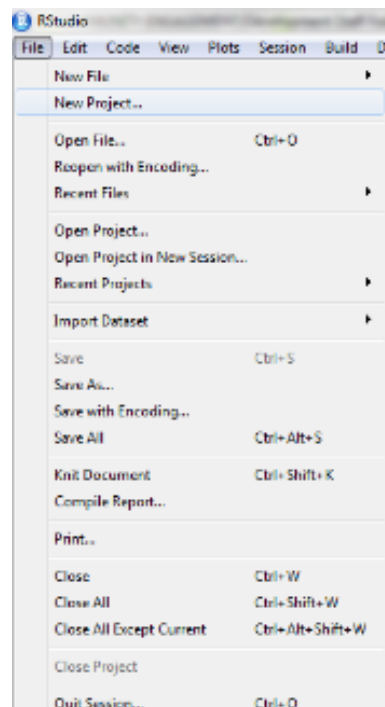
Assign a name to the directory, then select the folder for the project by pressing **Browse…** All of the project documents (all Excel and .csv, .R files, word documents etc should be saved in this folder).
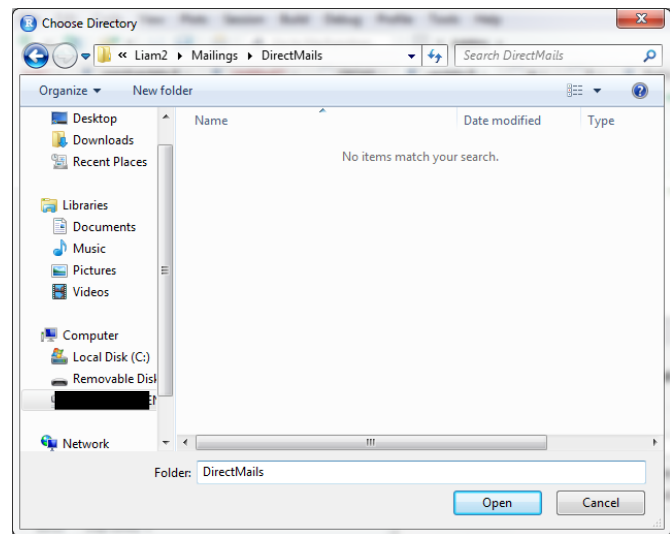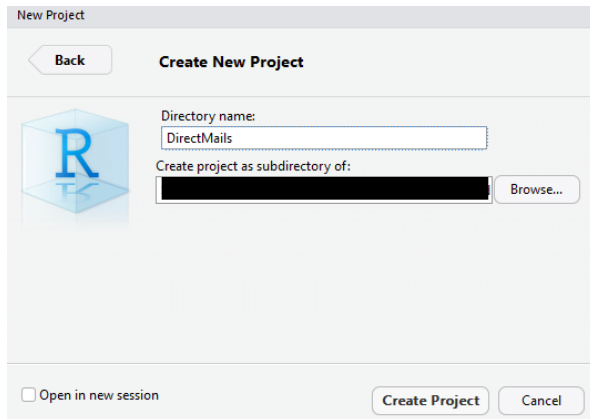
Click **Create Project**.

All documents will exist here.

The user can choose the layout of the panes in RStudio. To change the layout, select **View → Panes →Pane Layout**.
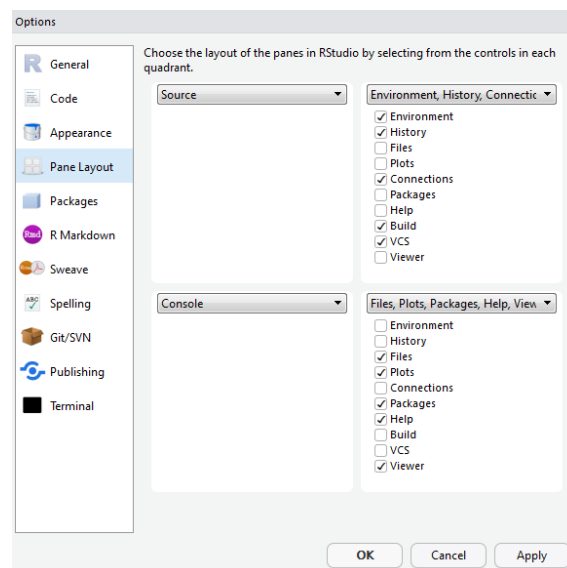
Open the "Cleaning" direct mail folder, then present working directory.
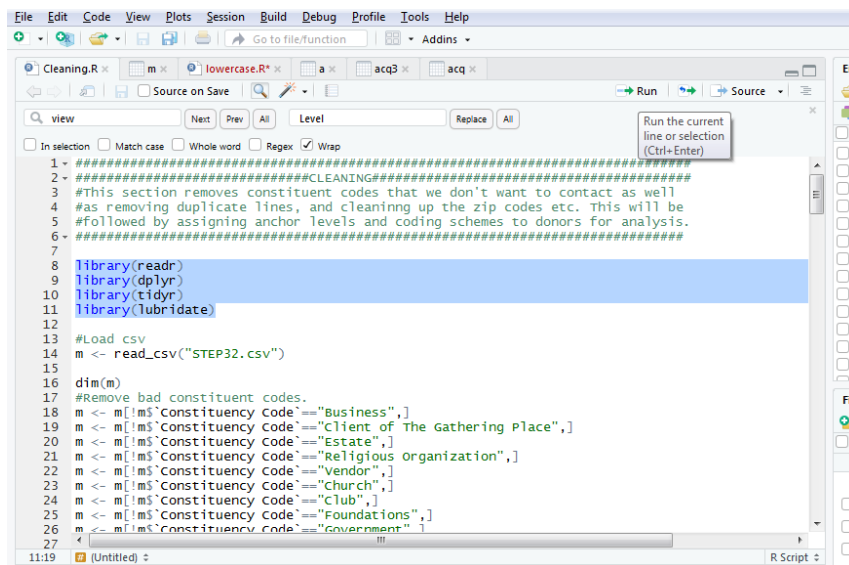
script from a previous save this script in your

Example: **File → Open → *change directory to location of file,*** S:\▇▇▇▇▇▇▇▇▇
▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇\Mom18, **→ Save As → *change directory*** S:\▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇
▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇▇\DirectMails, **→ Save as CleaningDM**

Opening .csv
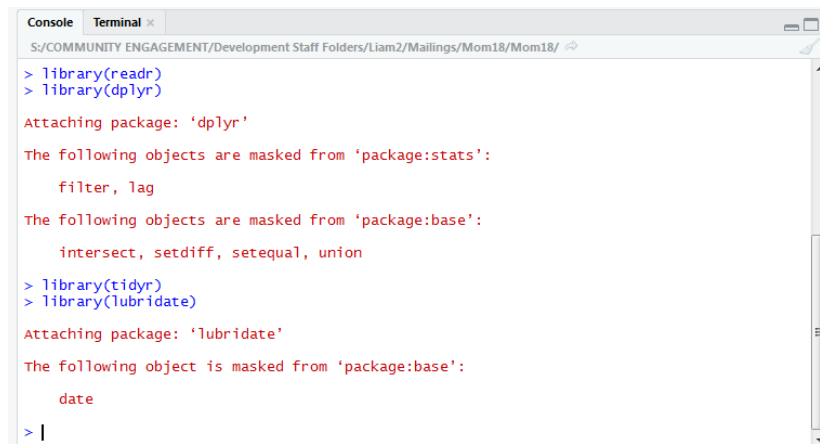
The first part of the "Cleaning Script" loads all necessary libraries for R to sort through the data. Highlight all four libraries and press **Run** or **Ctrl + Enter** or **Ctrl + r**. Use this method to run each command.

Library Name	Description
readr	Allows the user to open and save .csv files
dplyr	Allows user to clean and sort data
tidyr	Allows user to clean and sort data
lubridate	Facilitates date manipulation in R.

The program will output the information to the right. The red text alerts the user of base objects that have the same name as the new package objects. For example, *dplyr* has a command named "filter" which is a command that already exists in the base R package.

Next, load the .csv document into the "m" variable. Change the title of the .csv by editing the underlined portion of text.

```
13    #Load csv
14    m <- read_csv("STEP32.csv")
15
```

IMPORTANT: Ensure the .csv file is in the current working directory. In this example, the working directory is: S:\█████████████████████████████ \DirectMails. If the file is in any other location, R will not be able to read it. ██████████

Running this command produces the following output:

```
> m <- read_csv("STEP32.csv")
Parsed with column specification:
cols(
    `Constituent Import ID` = col_character(),
    Name = col_character(),
    `Key Indicator` = col_character(),
    `Constituency Code` = col_character(),
    `Last Gift Amount` = col_character(),
    `Last Gift Date` = col_character(),
    `Largest Gift Amount` = col_character(),
    `Largest Gift Date` = col_character(),
    `Gift Average Amount_1` = col_character(),
    `Gift Total Number of Gifts_1` = col_integer(),
    `Preferred Address Lines` = col_character(),
    `Preferred City_ State` = col_character(),
    `Preferred ZIP` = col_character(),
    `Primary Addressee` = col_character(),
    `Primary Salutation` = col_character(),
    `Gift Average Amount_2` = col_character(),
    `Solicit Code Description` = col_character(),
    `Last Gift Appeal ID` = col_character()
)
> |
```

Known Issue: Occasionally, loading the .csv results in an error stating that certain columns "failed to parse." Often if the user closes the R script, or reloads the .csv, this failure to parse ceases.

At this point, the user has the option to highlight the entire R script and run it. The following walks through the rest of the R script.

Removing Duplicates and Unwanted Constituency Codes

```
9    library(dplyr)
10   library(tidyr)
11   library(lubridate)
12
13   #Load csv
14   m <- read_csv("STEP32.csv")
15
16   #Remove bad constituent codes.
17   m <- m[!m$`Constituency Code`=="Business",]
18   m <- m[!m$`Constituency Code`=="Client of The Gathering Place",]
19   m <- m[!m$`Constituency Code`=="Estate",]
20   m <- m[!m$`Constituency Code`=="Religious Organization",]
21   m <- m[!m$`Constituency Code`=="Vendor",]
22   m <- m[!m$`Constituency Code`=="Church",]
23   m <- m[!m$`Constituency Code`=="Club",]
24   m <- m[!m$`Constituency Code`=="Foundations",]
25   m <- m[!m$`Constituency Code`=="Government",]
26   m <- m[!m$`Constituency Code`=="Organization",]
27   m <- m[!m$`Constituency Code`=="Schools",]
28   m <- m[!m$`Key Indicator`=="Organization",]
29   m <- m[!m$`Preferred Address Lines` == "",]
30
31   #Remove duplicate rows.
32   dim(m)
33   m <- m %>% distinct(`Constituent Import ID`, `Name`, `Key Indicator`,
34                       `Last Gift Amount`, `Last Gift Date`,
35                       `Largest Gift Amount`, `Largest Gift Date`,
36
```

The export from Raiser's Edge includes all constituency codes, this is to prevent excluding constituents that should be included. This portion of the R code removes all instances where the constituency code says: Business, Client of The Gathering Place, Estate, Religious Organization, Vendor, Church, Club, Foundations, Government, Organization, and Schools. It also removes any instance where the Key Indicator is Organization, and the Preferred Address lines are blank.

Example:

Name	Constituency Code
John Smith	Business
John Smith	Individual
John Smith	Vendor

Becomes:

Name	Constituency Code
John Smith	Individual

Next, remove all duplicate rows where every column contains the exact same information.

Example:

Import ID	Name	Address Lines	City	State	ZIP
123456	Jane Smith	123 Any St	Denver	CO	80123
123456	Jane Smith	123 Any St	Denver	CO	80123
123457	Jane Smith	124 Any St	Denver	CO	80123

Becomes:

Import ID	Name	Address Lines	City	State	ZIP
123456	Jane Smith	123 Any St	Denver	CO	80123
123457	Jane Smith	124 Any St	Denver	CO	80123

It is good practice to request the data frame dimensions to track how many constituents are removed. The command is: `dim(dataframe)` or in this case `dim(m)`. Run this before the duplicate removal and after each step, like in the code to the right.

The dataframe started with 20,868 rows, then was reduced to 19,018 rows when removing 100% duplicates across the columns, then 19,017 when removing duplicates across Constituent Import IDs. If there is a signifcant difference between the last two numbers, it may be worth considering examining the data frame for evidence of a poor export from Raiser's Edge.

The next piece of code writes a suppression file for Acculeads. To change the name of the file, just change the portion in quotes before .csv.

```
47  m <- m %>% separate(`Preferred City_ State`, into=c("City", "State"), sep=",")
48  ms <- m %>% select(Name, `Preferred Address Lines`,
49                     City, State,`Preferred ZIP`)
50
51
52  dim(ms)
53  write_csv(ms,"MomSurpression.csv")
```

Removing Constituents by "Giving Likelihood"

Previous analysis indicates that donors who give under $20 or are long time lapsed donors with few gifts are less likely to give again. These donors are suppressed in this segment.

This first removes the "$" from each gift amount so that R can read and manipulate these numbers.

Then the program removes those whose largest gift is under $20 with this command:

```
m <- m[!m$`Largest Gift
Amount` < 20,]
```

Line 64 changes the last gift date to a format that R can manipulate, then the program removes those whose last gift was before 12/31/2007 and the total number of gifts is under 5.

This data frame now has 10,264 rows, or 10,264 constituents. For this mailing, The Gathering Place wants about 10,000 names, so it requires no further list reduction.

If TGP needs fewer, or more names, simply change the largest gift amount or gift date or number of gifts accordingly. An English translation of the code is provided below to explain the logic of the program, should the user wish to suppress more specific criteria.

m <- m[!m$`Largest Gift Amount` < 20,]

m <- Where the user wants to store the new data frame. We overwrite the previous data frame.
m[!m$`Largest Gift Amount` < 20,] Selects data frame "m" and then all the rows where the gift amount is not (!) less than 20. It stores these in the new data frame.

m <- m[!m$`Last Gift Date` < mdy(12312007) & m$`Gift Total Number of Gifts_1` < 5),]

m <- Where the user wants to store the new dataframe.
m[!(m$`Last Gift Date` < mdy(12312007) Selects data frame "m" and then all the rows where the last gift date is not (!) less than older than 12/31/2007.
& AND
m$`Gift Total Number of Gifts_1` < 5)] all the rows where the total number of gifts is not (!) less than older than 5.

This program also removes monthly donors. The user should manually remove duplicate addresses, best practice is to keep the donor with the most recent gift year.

Assigning Package Codes

The next code segment assigns a year code for the constituent's last gift date. If the current year is 2018, and the donor's last gift year was 2018, the donor's package code for year is 0 because 2018-2018 = 0. If the donor's last gift year was 2005, then the donor's package code for year is 13 because 2018-2005 = 13.

The program also creates another metric which is the largest gift and last gift average of the donor, LGLG. If the donor's LGLG if more than 1.5 times as much as the donor's nonzero average gift amount, then the program uses the nonzero average gift for the anchor values, otherwise it uses the LGLG. This is to prompt the donor to reach a bit in his or her donation amount.

Example: John's last gift was $100, and John's largest gift is $1500. His LGLG is $800. Assume, excluding John's in kind gifts (which have a value of $0), his average gift is $500. The difference between his LGLG and his average gift is $300, which is less than 1.5 times his average gift ($500 x 1.5 = $750). Use his LGLG value.

$$Gift_{last} = \$100$$
$$Gift_{largest} = \$1500$$
$$\frac{Gift_{last} + Gift_{largest}}{2} = \frac{\$100 + \$1500}{2} = \$800 \Rightarrow LGLG$$
$$\left|Gift_{average} - LGLG\right| = |\$500 - \$800| = \$300$$
$$\$300 \geq 1.5 \times \$500 \,?$$
$$\boldsymbol{No, use\ the\ LGLG\ to\ determine\ anchor\ value}$$

Sally's last gift was $100 and her largest gift was $1500, her LGLG is also $800. But now, assume that her average gift is $150. The difference between her LGLG and average gift is $650, which is more than 1.5 times her average gift ($150 x 1.5 =$225). Use her average gift value.

$$Gift_{last} = \$100$$
$$Gift_{largest} = \$1500$$
$$\frac{Gift_{last} + Gift_{largest}}{2} = \frac{\$100 + \$1500}{2} = \$800 \Rightarrow LGLG$$
$$\left|Gift_{average} - LGLG\right| = |\$150 - \$800| = \$650$$
$$\$650 \geq 1.5 \times \$150 \,?$$
$$\boldsymbol{Yes, use\ her\ average\ gift\ value}$$

Run lines 75 to 96 to perform the above calculation.

This program creates two separate tables: one using the average gift value, and one using the LGLG, it then pastes these tables together at once all anchor values have been changed.

```
75  m <- m %>% separate(`Last Gift Date`,
76                  into =c("Year", "Month", "Day"))
77  m$Year <- (2018-as.numeric(m$Year))
78  colnames(m)
79  #Remove Monthly donors
80  m <- m[!(m$`Year` == 0 & m$`Last Gift Appeal ID`=="Safe Place"),]
81  m <- m[!(m$`Year` == 0 & m$`Last Gift Appeal ID`=="Monthly Giver"),]
82
83  m$Month <- NULL
84  m$Day <- NULL
85
86  m$Level <- NA
87  m$Level <- ((m$`Last Gift Amount`+m$`Largest Gift Amount`)/2)
88  m$levelcode <- NA
89
90  m$diff <- NA
91  m$diff <- abs(m$`Gift Average Amount_2` - m$Level)
92
93  ###If last gift largest gift average is more than 1.5 times the average gift amount
94  ## we use the average gift amount (non zero gifts) to determine the prompts
95  m$greaterthan <- NA
96  m$greaterthan <-ifelse(m$diff > 1.5*m$`Gift Average Amount_2`, TRUE, FALSE)
```

This program uses inclusion/exclusion principles to assign anchor values. Appendix A provides a quick snapshot of the process the program performs. Major donors were not included in the Mother's Day mailing.

Year	Donation Amount	Code
[19, 27]	[250, +)	C
[19, 27]	[100, 250)	B
[19, 27]	(0,100)	A
[7,18]	[750, +)	D
[7,18]	[250, 750)	C
[7,18]	[100, 250)	B
[7,18]	(0, 100)	A
[0,6]	[5000, +)	MAJOR
[0,6]	[2500, 5000)	E
[0,6]	[750, 2500)	D
[0,6]	[250, 750)	C
[0,6]	[100, 250)	B
[0,6]	(0, 100)	A

Once this process completes, R binds the two tables together. In this case, the program adds mother's day indicators, of M and 18, and attaches these codes to the donor's level indicator.

Using the donor's giving level code, R then assigns three anchors accordingly. A table is presented below outlining each anchor.

Code	AnchorLow	AnchorMid	AnchorHigh
A	$35 provides a nutritious meal to 11 members	$75 provides clean clothing for 11 members	$125 supplies a month of infant nutrition to 5 mothers
B	$150 pays for 2 weeks of jobs and education assistance	$200 provides a nutritious meal to 80 members	$250 supplies a month of infant nutrition to 10 mothers
C	$300 pays for 1 month of jobs and education assistance	$500 provides a nutritious meal to over 200 members	$700 pays for 6 months of high school equivalency exam fees
D	$700 pays for 6 months of high school equivalency exam fees	$1000 supplies a month of infant nutrition to 45 mothers	$1500 provides 3 days of nutritious meals to over 200 daily visitors
E	$1500 provides 3 days of nutritious meals to over 200 daily visitors	$2000 supplies 2 months of infant nutrition to 45 mothers	$3750 supplies the family area for 3 months

Assigning Package Codes to the Acquisition List

Currently, there exists no program to automatically run this update. Here are the steps accomplished.

Use national giving estimates based on annual income to develop these anchor values. This is the data from 2014[1]. The Mother's Day acquisition list only included individuals with income over $90,000. These values are highlighted in red.

Size of AGI By Income Range	Average Donation: Givers Only	Divided by 12
All returns	$5,814	
Under $5,000	$768	
$5,000–$9,999	$1,479	
$10,000–$14,999	$1,678	
$15,000–$19,999	$2,041	
$20,000–$24,999	$2,275	
$25,000–$29,999	$2,568	
$30,000–$34,999	$2,585	
$35,000–$39,999	$2,359	
$40,000–$44,999	$2,586	
$45,000–$49,999	$2,837	

[1] https://www.frugalfringe.com/calculators/compare-your-charitable-giving-to-other-contributors-by-age-and-income-2014-irs-data/

$50,000–$54,999	$2,804	
$55,000–$59,999	$2,904	
$60,000–$74,999	$3,050	
$75,000–$99,999	$3,356	$279.67
$100K–$199,999	$4,130	$344.17
$200K–$499,999	$7,424	$618.67
$500K–$999,999	$18,615	$1551.25
$1M–$1,499,999	$38,621	$3218.42
$1.5M–$1,999,999	$56,412	$4701.00
$2M–$4,999,999	$107,840	$8986.67
$5M–$9,999,999	$286,779	$23898.25
$10M or more	$2,191,570	$182630.83

Giving a donor a $2,000,000 prompt is unlikely to yield results; therefore, divide the annual giving amount by 12 to get a range of donor values. See the created ranges below:

Estimated Income	Average Donation μ	$\left(\dfrac{\mu}{12}\right) \times 0.5$	$\left(\dfrac{\mu}{12}\right)$	$\left(\dfrac{\mu}{12}\right) \times 1.5$	Code
$75,000-$99,999	$3,356	$140	$279.67	$419.50	H
$100K-$199,999	$4,130	$172	$344.17	$516.25	I
$200K-$499,999	$7,424	$309	$618.67	$928.00	J
$500K-$999,999	$18,615	$776	$1,551.25	$2,326.88	K
$1M-$1,499,999	$38,621	$1,609	$3,218.42	$4,827.63	L
$1.5M-$1,999,999	$56,412	$2,351	$4,701.00	$7,051.50	M
$2M-$4,999,999	$107,840	$4,493	$8,986.67	$13,480.00	M
$5M-$9,999,999	$286,779	$11,949	$23,898.25	$35,847.38	M
$10M or more	$2,191,570	$91,315	$182,630.83	$273,946.25	M

The acquisition list has the following breakdown of incomes. This table also includes the income range's updated anchor code. Using the donor's estimated income and the three levels of prompts, partition each updated code into three approximately equal segments.

Example: 24 individuals will receive the most conservative prompts for level H, and 25 will receive the least conservative prompts.

Original Code	Estimated Income	Updated Code	Low	Middle	High
H	$90,000 - $99,999	H	24	24	25
I	$100,000 - $109,999	I	30	31	31
J	$110,000 - $119,999	I	97	97	98
K	$120,000 - $129,999	I	237	238	238
L	$130,000 - $139,999	I	154	154	154
M	$140,000 - $149,999	I	115	116	116
N	$150,000 - $174,999	I	352	353	353
O	$175,000 - $199,999	I	144	144	145
P	$200,000 - $224,999	J	84	84	84
Q	$225,000 - $249,999	J	44	44	44
R	$250,000 - $274,999	J	64	64	65
S	$275,000 - $299,999	J	44	45	45
T	$300,000 - $399,999	J	87	87	87
U	$400,000 - $499,999	J	61	62	62
V	$500,000 - $599,999	K	44	44	44
W	$600,000 - $749,999	K	13	13	14
X	$750,000 - $999,999	K	22	22	22
Y	$1,000,000 - $1,999,999	L	30	30	31
Z	$2,000,000+	M	13	13	14

PROMPTS: HIGH			
1H	$125	$250	$500
1I	$150	$250	$500
1J	$300	$500	$700
1K	$700	$1,000	$2,000
1L	$1,000	$2,500	$3,750
1M	$2,500	$3,750	$5,000

PROMPTS: MID			
2H	$75	$150	$300
2I	$125	$250	$300
2J	$200	$300	$500
2K	$500	$700	$1,000
2L	$700	$2,000	$3,750
2M	$1,000	$2,500	$3,750

PROMPTS: LOW			
3H	$50	$125	$250
3I	$75	$150	$250
3J	$150	$250	$300
3K	$300	$500	$700
3L	$500	$1,000	$1,500
3M	$1,000	$2,000	$2,500

The letter represents the income and the number represents which of the three levels of prompts a donor will receive: 1 is the least conservative, 2 is middle of the road, and 3 is the most conservative. The anchors values and their prompts for both the acquisition list and the house file list are in Appendix C.

High Level Summary

- Select all donors who have made a cash gift from January 1, 1990 until March 20, 2018
- Suppress:
    - Donors who request no mail
    - Constituent codes: Business, Client of The Gathering Place, Estate, Religious Organization, Vendor, Church, Club, Foundations, Government, Organization, Schools
    - Blank "Preferred Address Lines"
    - Donors whose largest gift amount was strictly less than $20.00
    - Donors whose last gift date was before 12/31/2007 and the total number of gifts is greater than 5
    - Monthly donors
    - Donors whose average gifts are greater than $5,000
- Assign anchor codes
    - **House file**

Year	Donation Amount	Code
[19, 27]	[250, +)	C
[19, 27]	[100, 250)	B
[19, 27]	(0,100)	A
[7,18]	[750, +)	D
[7,18]	[250, 750)	C
[7,18]	[100, 250)	B
[7,18]	(0, 100)	A
[0,6]	[5000, +)	MAJOR
[0,6]	[2500, 5000)	E
[0,6]	[750, 2500)	D
[0,6]	[250, 750)	C
[0,6]	[100, 250)	B
[0,6]	(0, 100)	A[2]

- **Acquisition list**

Estimated Income	Average Donation μ	$\left(\dfrac{\mu}{12}\right) \times 0.5$	$\left(\dfrac{\mu}{12}\right)$	$\left(\dfrac{\mu}{12}\right) \times 1.5$	Code
$75,000-$99,999	$3,356	$140	$279.67	$419.50	H
$100K-$199,999	$4,130	$172	$344.17	$516.25	I
$200K-$499,999	$7,424	$309	$618.67	$928.00	J
$500K-$999,999	$18,615	$776	$1,551.25	$2,326.88	K
$1M-$1,499,999	$38,621	$1,609	$3,218.42	$4,827.63	L
$1.5M-$1,999,999	$56,412	$2,351	$4,701.00	$7,051.50	M
$2M-$4,999,999	$107,840	$4,493	$8,986.67	$13,480.00	M
$5M-$9,999,999	$286,779	$11,949	$23,898.25	$35,847.38	M
$10M or more	$2,191,570	$91,315	$182,630.83	$273,946.25	M

---

[2] Brackets […] mean *inclusive*, parenthesis mean *exclusive*. Example: [100, 250) means everything from $100 up to $249.9999999…

o   **Acquisition list Criteria**

Qty.	Description	Unit Price	Per	Extended Price
4996	Order Fulfillment	$0.00	M	$0.00
4996	Prizm Premier Household Indicator	$0.00	M	$0.00
4996	Gender	$0.00	M	$0.00
4996	Vacant Address Flag	$0.00	M	$0.00
4996	Age - Adult Age 2 Year Bands	$0.00	M	$0.00
4996	Number of Children Complete (2 or fewer children in home)	$2.50	M	$12.49
4996	Working Woman Indicator	$5.00	M	$24.98
4996	OCCUPATION/HEAD OF HH	$5.00	M	$24.98
4996	Community Involvement - Causes Supported Financially	$5.00	M	$24.98
4996	Education Level - Head of Household (at least college)	$5.00	M	$24.98
4996	Income - Premium Income – between $90k and $2mm	$8.00	M	$39.97
4996	Base - Consumer Base Single Use	$30.00	M	$149.88
4996	MARKET VALUE DECILE—Home Value	$15.00	M	$74.94
4996	Ethnicity - Group Code	$20.00	M	$99.92
4996	Financial - Charitable Giving Rank	$12.40	M	$61.95
4996	Prizm Premier Household	$20.00	M	$99.92
Sub Total:				$638.99
Tax ($638.99 x 0.0000):				$0.00
Total:				**$638.99**

Appendix A: Anchor Assignment Logic

```
UseMu$levelcode[UseMu$Year < 28] <- "C"
```

Name	Year	Amount	Anchor
Adam	27	700	C
Bernice	25	200	C
Charles	20	100	C
Darah	17	2500	C
Edward	15	700	C
Frances	13	200	C
Greg	8	50	C
Holly	6	4000	C
Igor	4	500	C
Jane	3	200	C
Kevin	0	20	C

```
UseMu$levelcode[UseMu$Year < 28 &
UseMu$`Gift Average Amount 2` < 250] <- "B"
```

Name	Year	Amount	C
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	B
Darah	17	2500	C
Edward	15	700	C
Frances	13	200	B
Greg	8	50	B
Holly	6	4000	C
Igor	4	500	C
Jane	3	200	B
Kevin	0	20	B

```
UseMu$levelcode[UseMu$Year < 28 &
UseMu$`Gift Average Amount_2` < 100] <- "A"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	C
Edward	15	700	C
Frances	13	200	B
Greg	8	50	A
Holly	6	4000	C
Igor	4	500	C
Jane	3	200	B
Kevin	0	20	A

```
UseMu$levelcode[UseMu$Year < 18 ] <- "D"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	D
Frances	13	200	D
Greg	8	50	D
Holly	6	4000	D
Igor	4	500	D
Jane	3	200	D
Kevin	0	20	D

```
UseMu$levelcode[UseMu$Year < 18 &
UseMu$`Gift Average Amount_2` < 2500] <- "D"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D

Name	Year	Amount	
Edward	15	700	D
Frances	13	200	D
Greg	8	50	D
Holly	6	4000	D
Igor	4	500	D
Jane	3	200	D
Kevin	0	20	D

```
      UseMu$levelcode[UseMu$Year < 18 &
 UseMu$`Gift Average Amount_2` < 750] <- "C"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	C
Greg	8	50	C
Holly	6	4000	D
Igor	4	500	C
Jane	3	200	C
Kevin	0	20	C

```
      UseMu$levelcode[UseMu$Year < 18 &
 UseMu$`Gift Average Amount_2` < 250] <- "B"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	B
Greg	8	50	B
Holly	6	4000	D

Name	Year	Amount	
Igor	4	500	C
Jane	3	200	B
Kevin	0	20	B

```
      UseMu$levelcode[UseMu$Year < 18 &
 UseMu$`Gift Average Amount_2` < 100] <- "A"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	B
Greg	8	50	A
Holly	6	4000	D
Igor	4	500	C
Jane	3	200	B
Kevin	0	20	A

```
UseMu$levelcode[UseMu$Year < 7 & UseMu$`Gift
      Average Amount_2` < 5000] <- "E"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	B
Greg	8	50	A
Holly	6	4000	E
Igor	4	500	E
Jane	3	200	E
Kevin	0	20	E

```
UseMu$levelcode[UseMu$Year < 7 & UseMu$`Gift
      Average Amount_2` < 2500] <- "D"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	B
Greg	8	50	A
Holly	6	4000	E
Igor	4	500	D
Jane	3	200	D
Kevin	0	20	D

```
UseMu$levelcode[UseMu$Year < 7 & UseMu$`Gift
      Average Amount_2` < 750] <- "C"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	B
Greg	8	50	A
Holly	6	4000	E
Igor	4	500	C
Jane	3	200	C
Kevin	0	20	C

```
UseMu$levelcode[UseMu$Year < 7 & UseMu$`Gift
      Average Amount_2` < 250] <- "B"
```

Name	Year	Amount	

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	B
Greg	8	50	A
Holly	6	4000	E
Igor	4	500	C
Jane	3	200	B
Kevin	0	20	B

```
UseMu$levelcode[UseMu$Year < 7 & UseMu$`Gift
      Average Amount_2` < 100] <- "A"
```

Name	Year	Amount	
Adam	27	700	C
Bernice	25	200	B
Charles	20	100	A
Darah	17	2500	D
Edward	15	700	C
Frances	13	200	B
Greg	8	50	A
Holly	6	4000	E
Igor	4	500	C
Jane	3	200	B
Kevin	0	20	A

Appendix B: Mailer Example
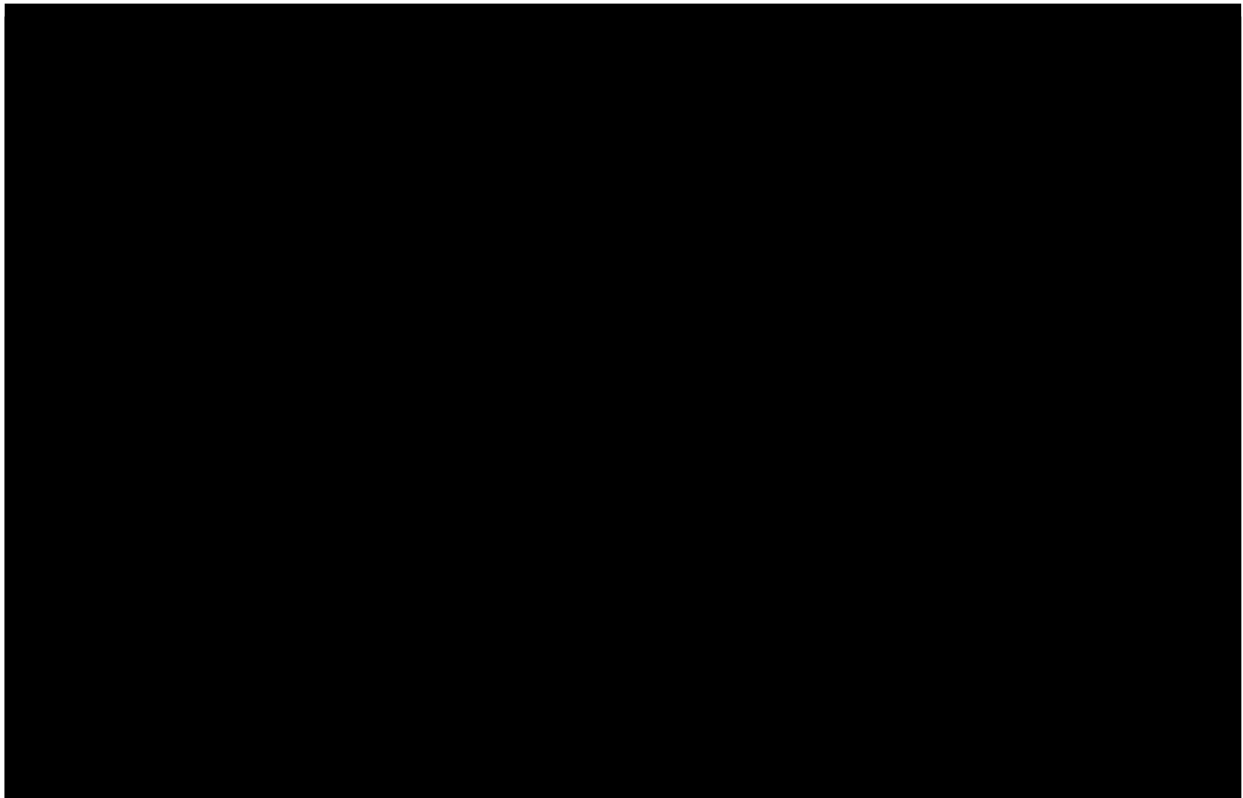
Appendix C: Acquisition List Purchases

Distributed: Consumer Data
Search ID: ███████
Title: Acxiom InfoBase? Consumer File 4/13/2018
Date Run: 4/13/2018 1:11:10 PM
Record Total: 4,996
Notes:

Geography
Radius
11 miles from ███████████████████████ (Type:DISTANCE Precision:ROOFTOP State Boundaries:No)

Demographic: ALL
Confidence/Use Code
Premium Deliverability
Gender (Individual)
Female, Male, Unknown
Ethnicity - Group Code
African American, Caribbean Non-Hispanic, Central Asian, East Asian, Eastern European, Hispanic, Jewish, Mediterranean, Middle Eastern, Native American, Polynesian, Scandinavian, South Asian, Southeast Asian, Western European, Uncoded
Financial - Charitable Giving Rank
75~99
Income - Premium Income Range
$60,000 - $69,999, $70,000 - $79,999, $80,000 - $89,999, $90,000 - $99,999, $100,000 - $109,999, $110,000 - $119,999, $120,000 - $129,999, $130,000 - $139,999, $140,000 - $149,999, $150,000 - $174,999, $175,000 - $199,999, $200,000 - $224,999, $225,000 - $249,999, $250,000 - $274,999, $275,000 - $299,999, $300,000 - $399,999, $400,000 - $499,999, $500,000 - $599,999, $600,000 - $749,999, $750,000 - $999,999, $1,000,000 - $1,999,999, $2,000,000+
Children - Number of
No Children, One Child, Two Children
Occupation Detail
Total Items: 306
Education
Completed College, Completed Graduate School
Prizm Premier Household
Upper Crust, Networked Neighbors, Movers & Shakers, Young Digerati, Country Squires, Winner's Circle, Money & Brains, Gray Power, Big Fish, Small Pond, Executive Suites, Fast-Track Families, Cruisin' to Retirement, Upward Bound
Prizm Premier Household Indicator
Household Level
One Per/All Per Household or Address

One Per Address (default)
Home Market Value Deciles (RPA)
Top 10% of Market, Next 10% of Market, Next 10% of Market, Next 10% of Market, Next 10% of Market
Suppress Orders
C040518031 - 19016
Vacant Address Flag
No Vacant Addresses
Working Woman Indicator
Working Woman
Only Records with Zip+4
Records with Zip+4
NCOA Bulk Mail Info
NCOA Expiration Date: 06/04/2018 NCOA Bulk Mail Info: The Consumer Data File is considered to be Move Update compliant if the addresses are mailed within 95 calendar days of the NCOA processing. Each order will be accompanied by an NCOA certificate. Mailers will need to present the NCOA certificate when entering a mailing with the USPS.
Demographic: EITHER
Art or Cultural
Art or Cultural
Charitable Causes
Charitable Causes
Childrens Causes
Childrens Causes
Political - Conservative
Political - Conservative
Health Interests
Health
Political - Liberal
Political - Liberal
Undefined
Undefined
Political
Political

Report Breakdown By: Zip5 Radius			
Zip5 Radius	**Description**	**Radius Distance**	**# Records**
████	██████	███	2
████	██████	███	1
████	██████	███	5
████	██████	███	188
████	██████	████	34
████	██████	███	6

			# Records
■	■	■	292
■	■	■	130
■	■	■	52
■	■	■	81
■	■	■	5
■	■	■	325
■	■	■	144
■	■	■	429
■	■	■	19
■	■	■	53
■	■	■	8
■	■	■	1
■	■	■	8
■	■	■	206
■	■	■	99
■	■	■	3
■	■	■	31
■	■	■	8
■	■	■	27
■	■	■	2
■	■	■	19
■	■	■	223
■	■	■	23
■	■	■	74
■	■	■	127
■	■	■	72
■	■	■	53
■	■	■	30
■	■	■	185
■	■	■	311
■	■	■	120
■	■	■	145
■	■	■	102
■	■	■	485
■	■	■	315
■	■	■	133
■	■	■	59
■	■	■	6
■	■	■	13
■	■	■	40
■	■	■	185
■	■	■	1
■	■	■	32
■	■	■	84
Total			**4996**

Report Breakdown By: Confidence/Use Code		
Confidence/Use Code	**Description**	**# Records**

1	Premium Deliverability	4996
Total		**4996**

Report Breakdown By: Gender (Individual)		
Gender (Individual)	**Description**	**# Records**
F	Female	2869
M	Male	2125
U	Unknown	2
Total		**4996**

Report Breakdown By: Ethnicity - Group Code		
Ethnicity - Group Code	**Description**	**# Records**
A	African American	51
B	Southeast Asian	9
C	South Asian	31
D	Central Asian	5
E	Mediterranean	224
F	Native American	4
G	Scandinavian	177
I	Middle Eastern	25
J	Jewish	143
K	Western European	3675
L	Eastern European	226
N	East Asian	96
O	Hispanic	179
Z	Uncoded	151
Total		**4996**

Report Breakdown By: Financial - Charitable Giving Rank	
Financial - Charitable Giving Rank	**# Records**
75	137
77	223
78	28
79	59
80	1
81	40
82	136
83	53
84	21
85	67
86	279
87	27
88	178
89	6
90	105
91	124

92	243
93	178
94	419
95	177
96	581
97	395
98	859
99	660
Total	**4996**

Report Breakdown By: Income - Premium Income Range		
Income - Premium Income Range	**Description**	**# Records**
H	$90,000 ██████	73
I	████████████	92
J	████████████	292
K	████████████	713
L	████████████	462
M	████████████	347
N	████████████	1058
O	████████████	433
P	████████████	252
Q	████████████	132
R	████████████	193
S	████████████	134
T	████████████	261
U	████████████	185
V	████████████	132
W	████████████	40
X	████████████	66
Y	████████████	91
Z	$2,000,000+	40
Total		**4996**

Report Breakdown By: Children - Number of		
Children - Number of	**Description**	**# Records**
0	No Children	1856
1	One Child	2239
2	Two Children	901
Total		**4996**

Report Breakdown By: Telephone Number		
Telephone Number	**Description**	**# Records**
0	No Phone Number Available	4772
1	Only Records with Phone	224
Total		**4996**

Report Breakdown By: Education		
Education	**Description**	**# Records**
2	Completed College	2730
3	Completed Graduate School	2266
Total		**4996**

Report Breakdown By: Prizm Premier Household		
Prizm Premier Household	**Description**	**# Records**
01	Upper Crust	446
02	Networked Neighbors	314
03	Movers & Shakers	871
04	Young Digerati	849
05	Country Squires	11
06	Winner's Circle	160
07	Money & Brains	1013
08	Gray Power	406
09	Big Fish, Small Pond	12
10	Executive Suites	228
12	Cruisin' to Retirement	601
13	Upward Bound	85
Total		**4996**

Report Breakdown By: Prizm Premier Household Indicator		
Prizm Premier Household Indicator	**Description**	**# Records**
3	Household Level	4996
Total		**4996**

Report Breakdown By: Home Market Value Deciles (RPA)		
Home Market Value Deciles (RPA)	**Description**	**# Records**
01	Top 10% of Market	2430
02	Next 10% of Market	1163
03	Next 10% of Market	641
04	Next 10% of Market	438
05	Next 10% of Market	324
Total		**4996**

Report Breakdown By: Vacant Address Flag		
Vacant Address Flag	**Description**	**# Records**
N	No Vacant Addresses	4996
Total		**4996**

Report Breakdown By: Working Woman Indicator		
Working Woman Indicator	**Description**	**# Records**
Y	Working Woman	4996

Total	4996

Report Breakdown By: Only Records with Zip+4		
Only Records with Zip+4	**Description**	**# Records**
1	Records with Zip+4	4996
Total		**4996**

Appendix D: Anchors

Anchors should have fewer than 70 characters including spaces.

List	Code	AnchorLow	AnchorMid	AnchorHigh
HOUSE	A	$35 provides a nutritious meal to 11 members	$75 provides clean clothing for 11 members	$125 supplies a month of infant nutrition to 5 mothers
HOUSE	B	$150 pays for 2 weeks of jobs and education assistance	$200 provides a nutritious meal to 80 members	$250 supplies a month of infant nutrition to 10 mothers
HOUSE	C	$300 pays for 1 month of jobs and education assistance	$500 provides a nutritious meal to over 200 members	$700 pays for 6 months of high school equivalency exam fees
HOUSE	D	$700 pays for 6 months of high school equivalency exam fees	$1000 supplies a month of infant nutrition to 45 mothers	$1500 provides 3 days of nutritious meals to over 200 daily visitors
HOUSE	E	$1500 provides 3 days of nutritious meals to over 200 daily visitors	$2000 supplies 2 months of infant nutrition to 45 mothers	$3750 supplies the family area for 3 months
ACQ	3H	$50 provides a nutritious meal to 15 members	$125 supplies a month of infant nutrition to 5 mothers	$250 covers a week of physical and mental health assistance
ACQ	2H	$75 provides clean clothing for 11 members	$150 pays for 2 weeks of jobs and education assistance	$300 provides a nutritious meal to 120 members
ACQ	1H	$125 supplies a month of infant nutrition to 5 mothers	$250 supplies the family area for a week	$500 provides a nutritious meal to over 200 members
ACQ	3I	$75 provides clean clothing for 11 members	$150 pays for 2 weeks of jobs and education assistance	$250 covers a week of physical and mental health assistance
ACQ	2I	$125 supplies a month of infant nutrition to 5 mothers	$250 covers a week of physical and mental health assistance	$300 pays for 1 month of jobs and education assistance
ACQ	1I	$150 pays for 2 weeks of jobs and education assistance	$250 supplies the family area for a week	$500 provides a nutritious meal to over 200 members
ACQ	3J	$150 pays for 2 weeks of jobs and education assistance	$250 covers a week of physical and mental health assistance	$300 provides a nutritious meal to 120 members

ACQ	2J	$200 provides a nutritious meal to 80 members	$300 pays for 1 month of jobs and education assistance	$500 supplies a month of infant nutrition to 20 mothers
ACQ	1J	$300 pays for 1 month of jobs and education assistance	$500 provides a nutritious meal to over 200 members	$700 pays for 6 months of high school equivalency exam fees
ACQ	3K	$300 pays for 1 month of jobs and education assistance	$500 provides a nutritious meal to over 200 members	$700 pays for 6 months of high school equivalency exam fees
ACQ	2K	$500 provides a nutritious meal to over 200 members	$700 pays for 6 months of high school equivalency exam fees	$1000 supplies a month of infant nutrition to 45 mothers
ACQ	1K	$700 pays for 6 months of high school equivalency exam fees	$1000 supplies a month of infant nutrition to 45 mothers	$2000 covers 2 months of physical and mental health assistance
ACQ	3L	$500 provides a nutritious meal to over 200 members	$1000 supplies a month of infant nutrition to 45 mothers	$2000 covers 2 months of physical and mental health assistance
ACQ	2L	$700 pays for 6 months of high school equivalency exam fees	$2000 covers 2 months of physical and mental health assistance	$3750 supplies the family area for 3 months
ACQ	1L	$1000 supplies a month of infant nutrition to 45 mothers	$2500 provides 1 week of nutritious meals to over 200 daily visitors	$3750 supplies the family area for 3 months
ACQ	3M	$1000 supplies a month of infant nutrition to 45 mothers	$2000 covers 2 months of physical and mental health assistance	$2500 provides 1 week of nutritious meals to over 200 daily visitors
ACQ	2M	$1000 supplies a month of infant nutrition to 45 mothers	$2500 provides 1 week of nutritious meals to over 200 daily visitors	$3750 supplies the family area for 3 months
ACQ	1M	$2500 provides 1 week of nutritious meals to over 200 daily visitors	$3750 supplies the family area for 3 months	$5000 pays for 4 months of physical and mental health assistance