



Standard Major Gift Target Codes

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A coding system is needed to identify and rank all prospective major gift prospects, whether individuals, foundations or companies. We use a code such as "A2" or "E3". The letter refers to *potential gift amount* and ranges from A through H (See table below). The number refers to *relationship*, which roughly translates into odds of success, and ranges from 1 to 5, with 1 representing a very close relationship, and 5 a wild card.

Most fund raising programs have a field expressly designed for a code such as this. **For example, Blackbaud's Raiser's Edge has a field labeled "Target" on Bio Tab2 that should be employed for this code.** Other software platforms use a field called "Rating."

A Target Code has four benefits.

Prioritize Efforts. First, the use of a **letter/number combination** like A5 or C1 quickly tells development staff where they need to spend time. For example, we'd rather invest time pursuing a C1 prospect (a relatively 'sure' \$250,000) rather than an A5 (\$1M long shot). Conversely, it's better to invest time in an A5 (\$1M long shot) than a G1 (relatively sure \$10,000) because the payback is so much more significant with the A5 prospect.

Ease of Use / Greater Efficiency. The code allows computer programs to quickly sort out our best prospects based upon potential gift amount and likelihood of success.

Cultivation Tool. People with target codes are also a great place to turn when trying to fill vacancies on boards, events and committees. *Use the Target Code to determine 'who needs to be involved' long before your next capital campaign.*

Confidentiality. Second, prospect lists are periodically shared at board or committee meetings, and confidential papers are sometimes not treated as such. Should a potential donor inadvertently see their name listed with a target code, there is no harm. Conversely, if they were to see their name with "\$1,000,000" beside it in the 'target' column—that might prove discomfiting for the would-be donor and embarrassing to development staff: Thus, the use of the code. Using a target code (rather than an actual dollar amount) may be cumbersome at first, but it is relatively easy to memorize the letter/number combinations below.

The Target Code is a "diagnosis" based upon all available wealth/relationship data.

*Your database may include a variety of wealth indicators: job title, place of employment, giving history, home value, D&B data, GuideStar data, and a host of other information provided by wealth search engines. **The codes are a summary, a subjective judgment based upon reams of information.***

Just as a doctor looks at various medical tests to determine a diagnosis, the development professional reviews wealth and relationship indicators and assigns a "diagnosis" to a constituent through the use of the Target Code.

Not all records are assigned a Target Code. Typically, only 200-300 'earn' a Target Code, because that is the number of constituents that most organizations can reasonably hope to solicit face-to-face in a reasonable period of time.

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The target codes are assigned as part of campaign prep, and create a **Master List of Major Gift Prospects**. This vastly improves the speed at which one executes a capital campaign. *In fact, we are perplexed as to how some organizations attempt to execute the major gifts portion of a campaign without it.*

NOTE: Target codes change over time as new information becomes available. In our opinion it is the *single* most important identifying field in any donor's record. **This single field helps us, as development professionals, focus limited time where the odds of payback are greatest.**

Letter + Number = Target Code

Examples

A5 Means a million dollar 'wild card' prospect.

E2 Indicates a \$50,000 prospect with a long standing relationship and thus a high probability of getting a gift.

Letter	Potential Funding Amount
A	\$1,000,000
B	\$500,000
C	\$250,000
D	\$100,000
E	\$50,000
F	\$25,000
G	\$10,000
H	\$5,000

Number	Relationship (= Odds of Closing a Gift)
1	Among our closest relationships; immediate buying signals apparent
2	Long standing relationship; a high probability of getting a gift
3	Intermittent personal contact between charity and donor, perhaps some giving history; worth pursuing a gift
4	Minimal relationship; definitely not considered 'low hanging fruit.' May require additional investment of time to prepare for an ask
5	Long shot; a "Wild Card."