

› Goal Setting in Three Easy Steps



When goal-setting, it is helpful to look at previous years' results, find trends that may be occurring in your company's campaign, and identify areas for potential growth. Here are three steps to make this process easier, please contact your Donor Relations consultant for more assistance.

1. Assess the Data

Previous Year Campaign Results

Employee Giving Total: _____ Leadership Giving Total (\$500+ annually): _____
 # of Employees: _____ # of Donors: _____ # Leadership Givers: _____
 Employee Participation (total # of donors divided by total # of employees): _____
 Employee Average Gift (total # of donors divided by total employee giving amount): _____
 Total Raised in Special Event(s): _____

Calculate the difference between each year's total giving and the company's overall giving trend

Previous three year giving totals: 2006: \$ _____ 2007: \$ _____ 2008: \$ _____
 Difference year to year: 2006 to 2007 _____ % 2007 to 2008 _____ %
 Average % of increase or decrease over past three years: _____ %

2. Identify Growth Opportunities for Employee Giving

Areas for growth include

Increasing participation:
 Average gift \$ _____ x # _____ of new donors = \$ _____
 Increasing average gifts of non-leadership giving donors:
 Amount of increase on each gift \$ _____ x # _____ of donors = \$ _____
 Growing leadership giving (gifts of \$500+ annually):
 \$500 x # _____ of new leadership giving level donors = \$ _____
 Identifying potential Alexis de Tocqueville Society donors (gifts of \$10,000+ annually):
 \$10,000 x # _____ of new Tocqueville Society level donors = \$ _____

Total Potential Growth for Employee Giving \$ _____

3. Identify Potential Growth in Corporate Giving

Does your company offer a corporate match for employee donations? If so, what are the guidelines? Does your company offer sponsorships, grants or other corporate gifts? These are a few examples of the types of areas you may want to consider when working to increase corporate support for United Way.

Add the **Potential Employee Giving** (2008 Total + Any of the Potential Growth Areas) \$ _____
 with any **Potential Corporate Gift** \$ _____
 added to **Potential Campaign Special Event Monies** \$ _____
 for an **estimated Total Campaign Goal** = \$ _____