

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:

1. Assess the 2008 Campaign Data

Previous Year Campaign Results \$ _____

Employee Giving Total \$ _____

Leadership Giving Total (\$1,000+ 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) \$ _____

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 % _____

2. Identify Potential Growth Opportunities in Employee Giving

Increasing participation

Average gift \$ _____ x _____ # of new donors = \$ _____

Growing leadership giving (gifts of \$1,000+ annually)

\$1,000 x _____ # of new leadership giving 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? You may want to consider these types of questions when working to increase corporate support for United Way.



LIVE UNITED

GIVE. ADVOCATE.
VOLUNTEER.

Finally, Calculate Your 2009 Goal

Add the Potential Employee Giving (2008 Total + Any of Potential Growth Areas)

_____ + _____

with any Potential Corporate Gift \$ _____

added to Potential Campaign Special Event Monies \$ _____

for an estimated Total Campaign Goal = \$ _____