

## Setting Your Campaign Goals – What Does Your Data Say United Way of Greater Kingsport

There are many things to consider and several methods to use when setting your campaign goals. To be able to set realistic goals, you need to look at your past giving history, analyze the data, and calculate your potential. Here is a worksheet to help you:

### Review and Analyze Past Campaign Results:

#### Collecting Your Data:

With your steering committee and CEO, review your giving history. Look at the following (on a departmental level if your organization is large enough):

\_\_\_\_\_ Number of employees

\_\_\_\_\_ Number of givers

\_\_\_\_\_ Number of payroll deductions

\_\_\_\_\_ Payroll deduction total

\_\_\_\_\_ Number at Caring Gift Guide (See pledge card for caring gift guide.)

\_\_\_\_\_ Number of Leadership Givers

\_\_\_\_\_ Leadership dollars

(Initial Club - \$500 - \$999; Signature Club - \$1,000 - \$9,999; Alexis de Tocqueville - \$10,000+)

\_\_\_\_\_ Number of Leadership prospects (may be assessed by Management level positions)

\_\_\_\_\_ Total employee dollars

\_\_\_\_\_ Special event dollars

\_\_\_\_\_ Corporate gift

\_\_\_\_\_ Total Campaign (employee + corporate + special event)

### Calculations:

Use the space on the next page to analyze your data from last year and make plans for this year. In the first column, calculate last year's information. Use the second column for each area where you feel the need to set a goal. Based on your analysis of your campaign history, you should be able to identify strengths, opportunities for improvement, and challenges due to changes in the business environment. Then you will be ready to identify strategies and set goals for your campaign.

**Last Year's Results**

**This Year's Goal**

\_\_\_\_\_  
(Campaign Year)

\_\_\_\_\_  
(Campaign Year)

<b>% Participation</b> (number of givers ÷ number of employees)	_____ %	_____ %
<b>Average Gift</b> (total employee dollars ÷ number of givers)	\$ _____	\$ _____
<b>Average Cash/Check Gift</b> (cash/check total ÷ number of cash/check givers)	\$ _____	\$ _____
<b>Average Direct Bill Gift</b> (direct bill total ÷ number of direct bill givers)	\$ _____	\$ _____
<b>Average Credit Card Gift</b> (credit card total ÷ number of credit card givers)	\$ _____	\$ _____
<b>Average Payroll Gift</b> (payroll deduction total ÷ number of payroll givers)	\$ _____	\$ _____
<b>Per Capita Gift</b> (total employee dollars ÷ number of employees)	\$ _____	\$ _____
<b>% of Givers at Leadership Level</b> (number of leadership givers ÷ number of givers)	_____ %	_____ %
<b>Average Leadership Gift</b> (total leadership dollars ÷ number of leadership givers)	\$ _____	\$ _____
<b>% of Campaign from Leadership \$'s</b> (total employee campaign ÷ total leadership dollars)	_____ %	_____ %
<b>Potential New Leadership Givers</b> (number of Leadership prospects – number of leadership givers)	_____	_____
<b>New Leadership Dollars</b> (based on your target population)	\$ _____	\$ _____
<b>Potential New Caring Gift or Fair Share</b> (see leadership example above)	\$ _____	\$ _____
<b>Total Campaign Goal</b>	\$ _____	\$ _____

