

GOAL SETTING WORKSHEET

This worksheet is designed to help us strategize and set goals for your workplace campaign. There are essentially three ways to increase your campaign:

1. Increase participation – more of your co-workers participate in the campaign
2. Increase average gift - existing donors increase their donation
3. Combination – increased participation and increased average gift

Once you have decided on one or more of the scenarios below, your UWNCA Relationship Manager can help you devise strategies of achieving your goals. By looking at what your company achieved in the last campaign, we can

_____ # of Employees	_____ Employee non-leadership contributions (\$1-\$999)
_____ # of Donors (\$1-\$999)	_____ Employee Leadership Contributions (\$1,000-\$9,999)
_____ # of Leadership Donors (\$1,000+)	_____ Employee Tocqueville Contributions (\$10,000+)
_____ # Tocqueville Donors (\$10,000+)	_____ Total Employee Donors
_____ Total # of Donors	

Current Campaign Status	Potential Campaign
_____ Employee Contributions	_____ # of non-participating employees
_____ Special Event Donations	_____ # of Leadership Prospects (\$500-\$999)
_____ Corporate Gift	_____ # of ADT Prospects (\$5,000-\$9,999)
_____ \$ - Total Campaign	_____ Employee Participation
	_____ Average Gift

First, let's look at the effect increasing participation can have on you campaign total. Some employees chose not to participate in last year's campaign. Our experience shows that once people start giving, they are likely to continue giving year to year once they how easy it is.

Scenario 1: More Donors

Increase Participation

$$\begin{array}{ccccccccc}
 \underline{\hspace{1cm}} & & \times & & \underline{\hspace{1cm}} & = & \underline{\hspace{1cm}} & + & \underline{\hspace{1cm}} & = & \underline{\hspace{1cm}} \\
 \# \text{ New} & & & & \text{average} & & & & \text{2007} & & \\
 \text{Donors} & & & & \text{increase} & & \text{new} & & \text{Campaign} & & \text{2008 Goal} \\
 & & & & & & \text{dollars} & & \text{Total} & &
 \end{array}$$

Now, let's look at the effect of increasing the average gift. Many people who already give have the potential to 'step up' their donation.

Scenario 2: More Dollars

Increase Average Gift

$$\begin{array}{ccccccccc}
 \underline{\hspace{1cm}} & & \times & & \underline{\hspace{1cm}} & = & \underline{\hspace{1cm}} & + & \underline{\hspace{1cm}} & = & \underline{\hspace{1cm}} \\
 \# & & & & \text{average} & & & & \$ - & & \\
 \text{increasing} & & & & \text{increase} & & \text{new} & & \text{2007} & & \\
 \text{donors} & & & & & & \text{dollars} & & \text{Campaign} & & \text{2008 Goal} \\
 & & & & & & & & \text{Total} & &
 \end{array}$$

Scenario 3:

More Donors & Dollars

Increase Participation and Average Gift

$$\begin{array}{cccccc}
 \underline{\hspace{2cm}} & \times & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} & + & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} & - \\
 \# \text{ new} & & \text{new} & & \text{new} & & \text{2007} & & \text{2008 Goal} \\
 \text{donors} & & \text{average} & & \text{dollars} & & \text{Campaign} & & \\
 & & \text{gift} & & & & \text{Total} & &
 \end{array}$$

Another way to grow your campaign is to focus specifically on Leadership Donors (\$1,000) and those who have the potential to become Leadership Donors.

Leadership Scenario: 1

More Leadership Donors

$$\begin{array}{cccccc}
 \underline{\hspace{2cm}} & \times & \underline{\hspace{2cm}} & \times & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\
 \# \text{ of Leadership Prospects} & & \% \text{ increase} & & \text{Average Leadership gift} & & \text{new dollars}
 \end{array}$$

Leadership Scenario 2: More Leadership Dollars

Increased average leadership gift

$$\begin{array}{ccccccccc}
 \underline{\hspace{2cm}} & \times & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} & 0 & + & \underline{\hspace{2cm}} & - & = & \underline{\hspace{2cm}} & - \\
 \# \text{ increasing} & & \text{average} & & \text{new} & & & \text{2007} & & & \text{2008 Goal} \\
 \text{leadership} & & & & \text{dollars} & & & \text{Campaign} & & & \\
 \text{donors} & & & & & & & \text{Total} & & &
 \end{array}$$

Leadership Scenario 3: More Leadership Donors & Leadership Dollars

Increase participation and average gift

$$\begin{array}{cccccc}
 \underline{\hspace{2cm}} & \times & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} & + & \underline{\hspace{2cm}} & = & \underline{\hspace{2cm}} \\
 \# \text{ new} & & \text{new average gift} & & \text{new} & & \text{2007} & & \text{2008 Goal} \\
 \text{donors} & & & & \text{dollars} & & \text{Campaign} & & \\
 & & & & & & \text{Total} & &
 \end{array}$$

By focusing on these segmented goals, we can tap in to the huge potential within your company. We can measure success in many different ways while helping to channel more funds to the agencies that provide essential services for our neighbors. Now that you have seen the potential, let's work to together to devise strategies to achieve your goals and create positive, lasting change in our community!

Your Relationship Manager

Phone

E-mail

Your Regional Relationship Manager

Phone

E-mail