

## 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

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

  

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

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

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*

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