

# Goal Setting Worksheet

A goal is important to maximizing the success of your workplace giving campaign. Use the goal setting formulas below to help you determine your new workplace campaign goals. If you need help or have questions, please contact CHC.

## Step 1: Review Previous Year's Results

$$\frac{\text{Number of Participants}}{\text{Average Gift}} \times = \text{Last Year's Total Amount Raised}$$

## DETERMINE YOUR GIVING POTENTIAL

$$\frac{\text{Last Year's Average Gift}}{\text{Total Current Number of Employees}} \times = \text{This Year's Total Potential}$$

## Step 2: Set This Year's Participant Goals

$$\frac{\text{Desired increase in Percent Participation}}{\%} \times \text{Total Number of Employees} = \text{Number of Additional Participants}$$

$$\text{Last Year's Number of Participants} + \text{Number of Desired Additional Participants} = \text{Number of Desired Participants}$$

$$\text{Number of Desired Participants} \times \text{Last Year's Average Gift} = \text{This Year's Amount Raised Goal}$$

Consider removing all leadership givers (\$1,000 and above) and their contributions from your figures as you work through this process. These contributions dramatically affect your goal. Follow the same process by using a blank copy of this page to establish a separate leadership giving goal.

### Step 3: Set This Year's Average Gift Goals

$$\frac{\text{Last Year's Average Gift}}{\text{Desired Percent Increase}} = \text{Increase in Average Desired Gift}$$

OR

$$\text{Last Year's Average Gift} + \text{Desired Increase in Average Desired Gift} = \text{This Year's Desired Average Gift}$$

#### MONTHLY ALTERNATIVE:

$$\text{Last Year's Average Monthly Gift} + \text{Desired Average Monthly Monetary Increase} = \text{This Year's Desired Monthly Average Gift}$$

To determine the monthly average for the average gift and desired monetary increase, divide the average sums by 12.

### Step 4: Finalize Overall Goals

$$\frac{\text{Desired Number of Participants}}{\text{This Year's Desired Average Gift}} = \text{This Year's Goal}$$

#### MONTHLY ALTERNATIVE:

$$\frac{\text{Desired Number of Participants}}{\text{This Year's Desired Monthly Average Gift}} = \text{This Year's Monthly Goal}$$

### Step 5: Take Action

- Share your goals with CHC staff.
- Promote and inform your organization's management team and staff on this year's goals.
- Integrate your goals into your existing campaign kick-off.
- Monitor and track your progress throughout the campaign.