



United Way
of North Central Florida

STEP 2: EVALUATE CAMPAIGN HISTORY AND SET GOALS

To know what you want to achieve, you need to know your past campaign results! Campaign goals are an important part of the keys to success! Make sure they're S.M.A.R.T – Specific, Measureable, Achievable, Reasonable, and Timely! An example of a S.M.A.R.T. goal is "to increase leadership dollars by 10 percent by November 1, 2018," instead of "increase leadership dollars."

How to evaluate your past results

- Set up a meeting with United Way staff and review past history.
- Determine what worked and what didn't work in prior years.
- Decide what is most important to your organization (i.e., average gift, employee participation, number of leaders, total dollars raised, etc.)
- SET GOALS!

Type	Life Pledge	2017 Pledge	2017 Chg %	2016 Pledge	2016 Chg %
Corp Gift	\$174,516.68	\$33,377.92	0.034	\$32,279.91	0.1474
Employee Gift	\$361,268.99	\$68,727.23	0.0293	\$66,771.05	0.1794
Other Non-Campaign Gift	\$1,000.00	\$0.00	0	\$0.00	0
Workplace Special Events	\$6,759.59	\$718.11	0.2151	\$591.00	0.3463
**CAMPAIGN TOTAL	\$542,545.26	\$102,823.26	0.0319	\$99,641.96	0.1697
**NON-CAMPAIGN TOTAL	\$1,000.00	\$0.00	0	\$0.00	0
Leader \$	\$172,514.34	\$35,434.10	-0.0828	\$38,634.32	0.1439
# Leader		37	-0.119	42	0.1351
# of Employees		257	0	257	0.3892
# of Donors		257	0.0363	248	0.2984
% Participation		1	0.0363	0.965	-0.0653
Average Gift		\$267.42	-0.0068	\$269.24	-0.0916
C/Capita		\$129.88	0.0341	\$125.60	-0.1741
E/Capita		\$267.42	0.0293	\$259.81	0.151
United Way Campaign	\$543,545.26	\$102,823.26	0.0319	\$99,641.96	0.1697

2015 Pledge	2015 Chg %	2014 Pledge	2014 Chg %	2013 Pledge	2013 Chg %	2012 Pledge	2012 Chg %
\$28,132.50	0.0775	\$26,108.94	0.488	\$17,546.00	0.2784	\$13,725.41	0.4428
\$56,612.26	0.0437	\$54,242.38	0.4642	\$37,046.00	0.3562	\$27,316.82	0.3792
\$0.00	0	\$0.00	0	\$0.00	-1	\$1,000.00	0
\$438.99	-0.3021	\$629.00	14.1749	\$41.45	-0.8232	\$234.50	-0.7706
\$85,183.75	0.0519	\$80,980.32	0.4822	\$54,633.45	0.3236	\$41,276.73	0.3604
\$0.00	0	\$0.00	0	\$0.00	-1	\$1,000.00	0
\$33,774.00	0.2499	\$27,020.50	1.4625	\$10,973.00	0.1584	\$9,472.32	0.1855
37	0.3214	28	2.1111	9	0.125	8	0
185	0.0756	172	0	172	0	172	0
191	-0.0104	193	0.1221	172	0.2555	137	-0.1543
1.0324	-0.0799	1.1221	0.1221	1	0.2555	0.7965	0
\$296.40	0.0546	\$281.05	0.3049	\$215.38	0.0802	\$199.39	0
\$152.07	0.0018	\$151.80	0.4881	\$102.01	0.2783	\$79.80	0
\$306.01	-0.0296	\$315.36	0.4642	\$215.38	0.3561	\$158.82	0
\$85,183.75	0.0519	\$80,980.32	0.4822	\$54,633.45	0.2923	\$42,276.73	0.3934

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STEP 2: EVALUATE CAMPAIGN HISTORY AND SET GOALS

Organization Campaign Plan

Organization: _____

Campaign Coordinator(s): _____

UW Staff Support: _____

Last Year Results: _____

This Year Internal Goal: _____

Last Year Participation: _____ Last Year Participation %: _____

This Year Participation Goal: _____ This Year Participation %: _____

Last Year Leadership Donors: _____ This Year Leadership Donors Goal: _____

CRITICAL CAMPAIGN ELEMENTS PLAN

Identify your top 3 elements to work on IMPROVING this year:

1. _____
2. _____
3. _____

Identify your top 3 elements you wish to ADD this year:

1. _____
2. _____
3. _____

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