

# STEP 4: 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.

## 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, participation, number of leaders, total dollars raised, etc.
- SET GOALS!

Type	Life Pledge	2016 Pledge	2016 Chg %	2015 Pledge	2015 Chg %
Corp Gift	\$141,138.76	\$32,279.91	0.1474	\$28,132.50	0.0775
Employee Gift	\$291,516.76	\$65,746.05	0.1613	\$56,612.26	0.0437
Other Non-Campaign Gift	\$1,000.00	\$0.00	0	\$0.00	0
Workplace Special Events	\$6,041.48	\$591.00	0.3463	\$438.99	-0.3021
<b>**CAMPAIGN TOTAL</b>	<b>\$438,697.00</b>	<b>\$98,616.96</b>	<b>0.1577</b>	<b>\$85,183.75</b>	<b>0.0519</b>
<b>**NON-CAMPAIGN TOTAL</b>	<b>\$1,000.00</b>	<b>\$0.00</b>	<b>0</b>	<b>\$0.00</b>	<b>0</b>
Leader \$	\$136,960.24	\$38,514.32	0.1404	\$33,774.00	0.2499
# Leaders		42	0.1351	37	0.3214
# of Employees		257	0.3892	185	0.0756
# of Donors		244	0.2775	191	-0.0104
% Participation		0.9494	-0.0804	1.0324	-0.0799
Average Gift		\$269.45	-0.0909	\$296.40	0.0546
C/Capita		\$125.60	-0.1741	\$152.07	0.0018
E/Capita		\$255.82	-0.164	\$306.01	-0.0296
United Way Campaign	\$439,697.00	\$98,616.96	0.1577	\$85,183.75	0.0519

  

2014 Pledge	2014 Chg %	2013 Pledge	2013 Chg %	2012 Pledge	2012 Chg %	2011 Pledge	2011 Chg %
\$26,108.94	0.488	\$17,546.00	0.2784	\$13,725.41	0.4428	\$9,513.00	0.3625
\$54,242.38	0.4642	\$37,046.00	0.3562	\$27,316.82	0.3792	\$19,806.43	0.2142
\$0.00	0	\$0.00	-1	\$1,000.00	0	\$0.00	0
\$629.00	14.1749	\$41.45	-0.8232	\$234.50	-0.7706	\$1,022.35	-0.2172
\$80,980.32	0.4822	\$54,633.45	0.3236	\$41,276.73	0.3604	\$30,341.78	0.2334
\$0.00	0	\$0.00	-1	\$1,000.00	0	\$0.00	0
\$27,020.50	1.4625	\$10,973.00	0.1584	\$9,472.32	0.1855	\$7,990.10	0.5563
28	2.1111	9	0.125	8	0	8	0.3333
172	0	172	0	172	0	172	0.075
193	0.1221	172	0.2555	137	-0.1543	162	0.0519
1.1221	0.1221	1	0.2555	0.7965	-0.1544	0.9419	0
\$281.05	0.3049	\$215.38	0.0802	\$199.39	0.6309	\$122.26	0
\$151.80	0.4881	\$102.01	0.2783	\$79.80	0.4428	\$55.31	0
\$315.36	0.4642	\$215.38	0.3561	\$158.82	0.3792	\$115.15	0
\$80,980.32	0.4822	\$54,633.45	0.2923	\$42,276.73	0.3934	\$30,341.78	0.2334

Example of reviewing your past campaign results

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## 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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