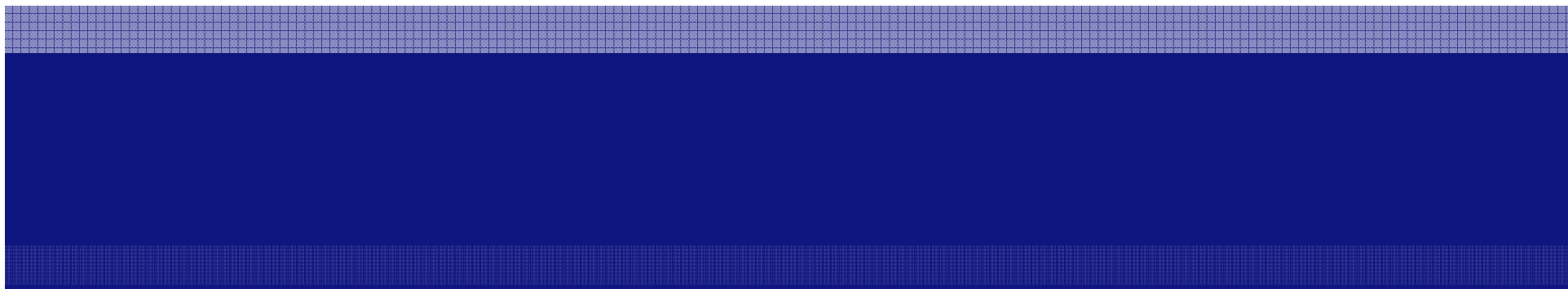




**GIVE. ADVOCATE. VOLUNTEER.  
LIVE UNITED™** 

# **Jumpstart 2010**

## ***Goal Setting Strategies***



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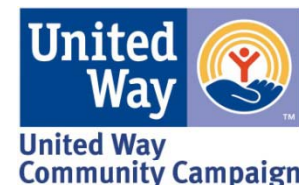
### ***Presenters***

- **Ann Péan**
- **Senior Manager, Donor Relations**
- **United Way of Central and Northeastern Connecticut**
  
- **Kate Milton**
- **Assistant Director, Donor Relations**
- **United Way of Central and Northeastern Connecticut**



# Goal Setting Strategies

## *Company Giving Histories*



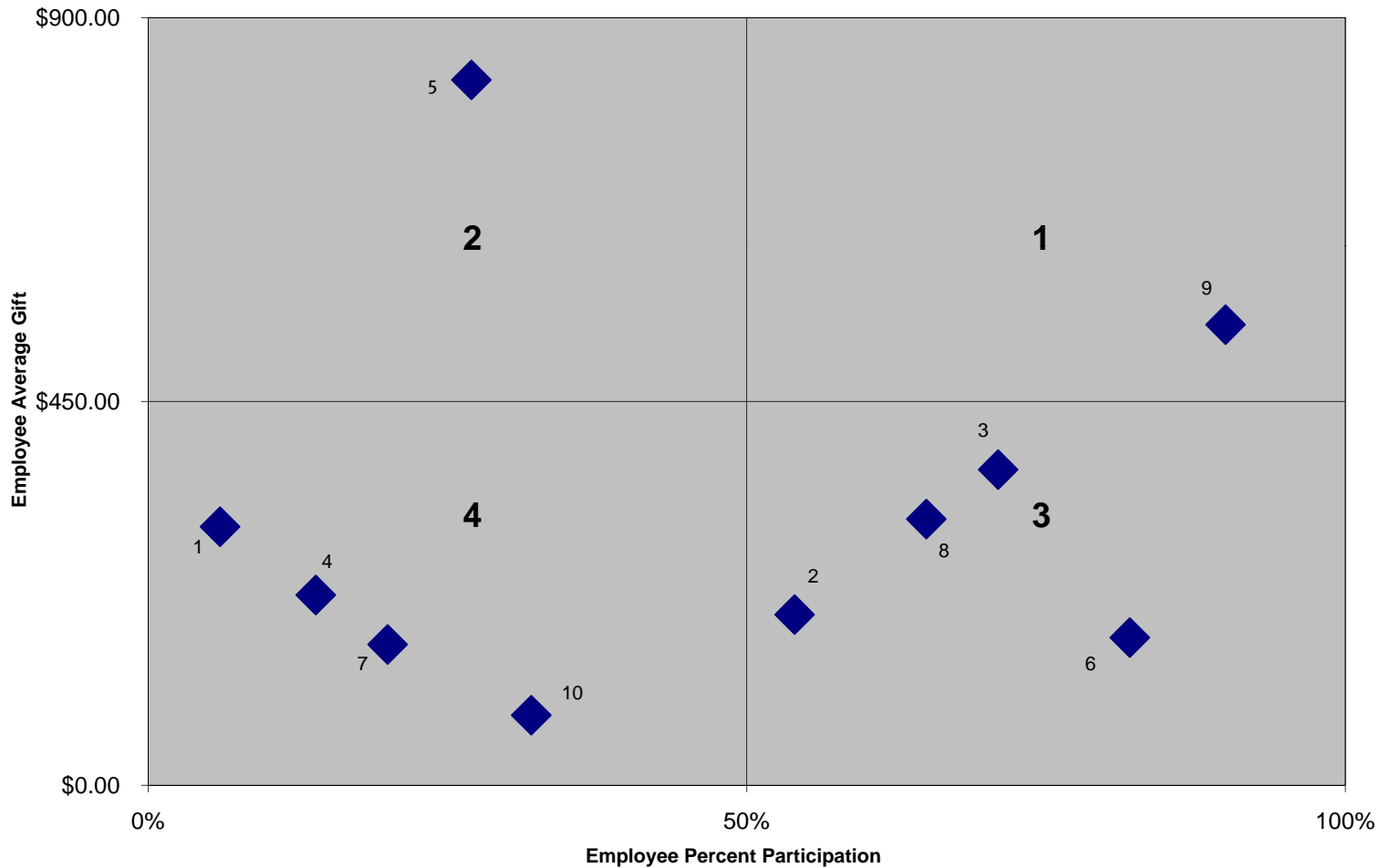
## Organizational Campaign History

- Employee Gift:** Pledge dollars raised by employees
- Leadership \$:** Dollars pledged by leadership donors (\$1,000+)
- LG Donors:** Number of donors at the Leadership Level
- # Employees:** Actual number of employees in organization
- # of Donors:** Actual number of employees who pledge
- % Participation:** Actual number of employees who pledge divided by total number of employees
- Average Gift:** Calculated by dividing Employee Gift by number of donors



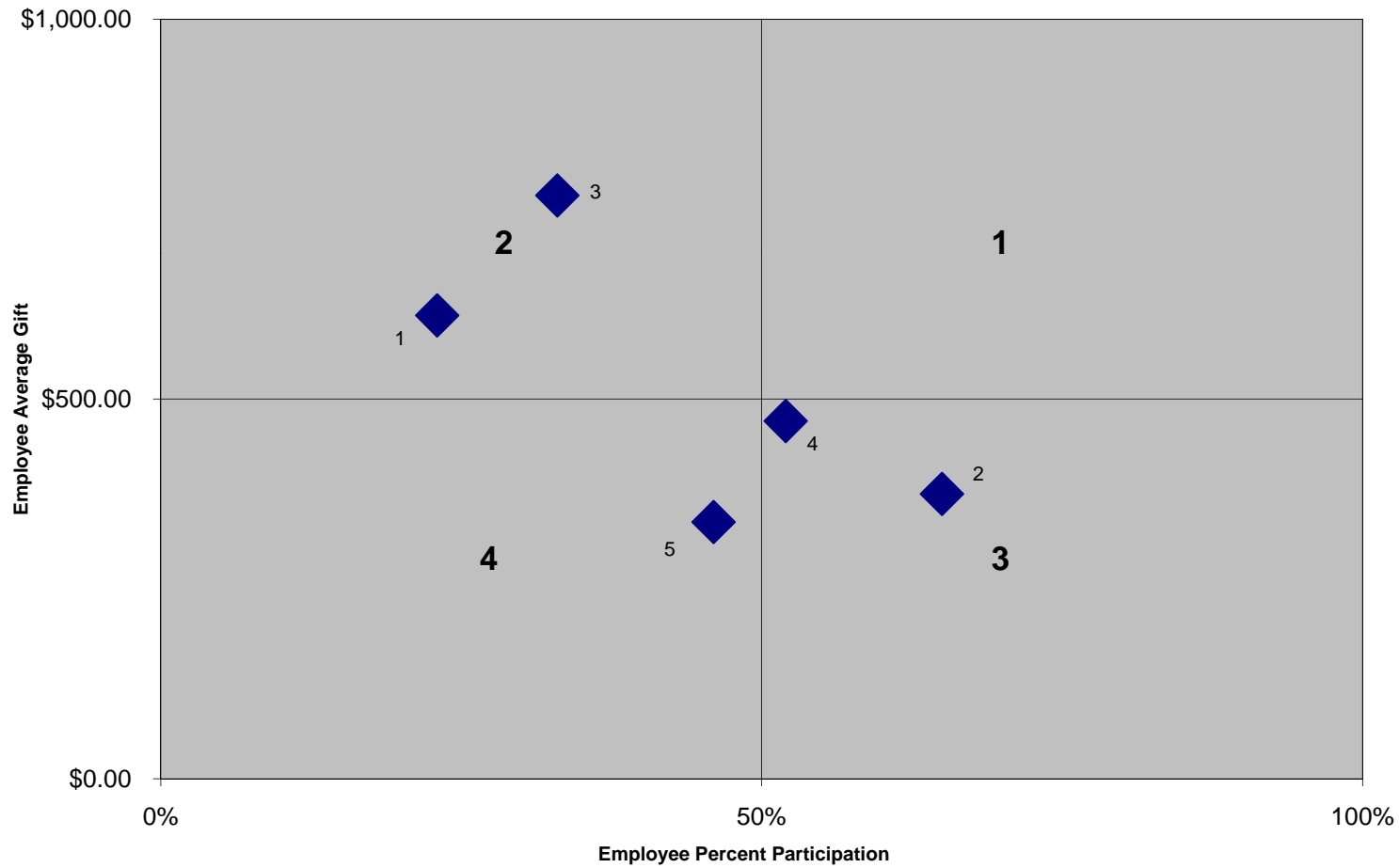
# Quadrant Analysis

## Small Companies (less than 500 employees)



# Quadrant Analysis

## Large Companies (500+ employees)



# Quadrant Analysis

**Quadrant 1:** Workplaces with high participation and high average gift

**Quadrant 2:** Workplaces with low participation but high average gift

**Quadrant 3:** Workplaces with high participation and low average gift

**Quadrant 4:** Workplaces with low participation and low average gift



## Quadrant 4: Campaigns with low average gift/low participation

### Increase Participation & Average Gift

#### *Strategies*

- Increase education & awareness through group meetings, agency speakers and agency tours; use group meetings or one-on-one solicitation to reach all employees.
- Provide incentives based on levels of giving.
- Emphasize that giving can provide a tax deduction.
- Emphasize the benefits of payroll deduction.
- Make the campaign fun for employees – make it a team builder and morale booster.
- Gain senior management support.
- Finally, remember to thank your colleagues and celebrate your success!

## Quadrant 2: Campaigns with high average gift/low participation

### Increase Participation

#### *Strategies*

- Enlist senior management support and endorsement – at rallies and meetings and through letters, emails, voice mails.
- Increase participation through education, awareness & communications.
  - Use internal communications to highlight loyal contributors, success stories, employee testimonials and “What Your Dollar Buys.”
  - Hold a kick-off meeting and invite your United Way representative and an Agency Speaker.
- Aim for 100% ask – give every employee the opportunity to give.
- Use Leadership Giving to encourage and recognize gifts of \$1,000+
- Celebrate your results with a post-campaign thank you event for donors and volunteers.

## Quadrant 3: Campaigns with low average gift/high participation

### Increase Average Gift

#### *Strategies*

- Maintain and recognize your loyal contributor base and consider targeted Special Events after pledging.
- Encourage payroll deduction as the preferred method of giving (build an incentive around it).
- Encourage employees to give at a “suggested-levels” (i.e. an hour’s pay per month, 1% or fairshare) and build an incentive around it.
- Provide information on “what your gift buys.”
- Establish an internal recognition program.
- Promote Leadership Giving.

## Quadrant 1: Campaigns with high participation/high average gift

### Focus on Leadership Giving

#### *Strategies*

- Secure the support and endorsement of senior management.
- Hold a Leadership event (breakfast, reception, etc.) for existing and potential Leadership Donors and establish a leadership recognition program.
- Challenge leaders to surpass what was raised last year.
- Recognize existing donors at a Loyal Contributor event or profile them in internal communications.
- Make the campaign fun for employees.
- Celebrate your results with a post-campaign victory party and thank donors and volunteers for their support.

# Best Practices



*One more donor, one more dollar, one more life changed!*

- 1) Maintain your donor base and increase the average gift.
- 2) Increase participation by reaching out to ALL employees – include those at other locations, departments and business units
- 3) Increase Leadership Giving
- 4) Use incentives, special events, rallies, agency speakers & bus tours to encourage employees to pledge
- 5) Follow up with those who have not handed in pledge forms or pledged online – remember, *the number one reason people say they don't contribute is that they weren't asked.*
- 6) Report your results and hold a thank you event for your donors

# What you CAN DO to grow your campaign



ABC Company has 77 employees

In 2009 they had a 30% participation rate (25 donors)

With an average gift of \$82

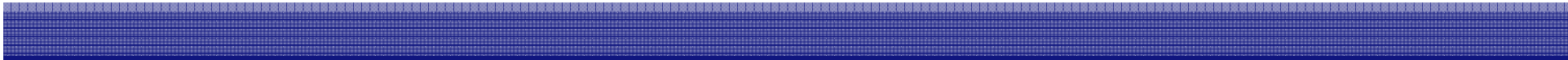
Total campaign = \$2,042

In 2010, they strive for an additional 13 donors to reach 50%

13 x \$52 average gift = \$676

13 x \$104 average gift = \$1,066

Total campaign = 3,108



XYZ Company has 600 employees

In 2009 they had a 25% participation rate (150 donors)

With an average gift of \$300

Total employee pledges = \$45,000

In 2010, they strive for an additional 150 donors to reach 50%

150 x \$104 average gift = \$15,500

150 x \$156 average gift = \$23,400

150 x \$300 average gift = \$45,00

Total potential employees pledges = \$90,000

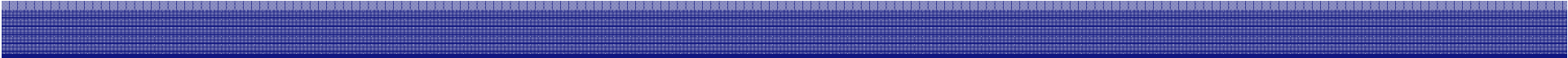
# Goal Setting Strategies



## Recap

- Strive for 100% ask
- Use the campaign video, agency speakers and personal stories to motivate employees to give
- Use incentives to increase participation and average gift
- Hold a Leadership event (breakfast, reception, etc.) for existing and potential Leadership Donors
- Recognize Loyal Contributors
- Remember to report results, celebrate your success and thank your donors!

## Questions & Answers



# Goal Setting Strategies



*To receive a copy of this presentation, please email Ann Péan at [apecan@unitedwayinc.org](mailto:apecan@unitedwayinc.org)*

*Please be sure to check out our website [www.unitedwayinc.org](http://www.unitedwayinc.org)*

