



GOAL  
SETTING  
GUIDE

2020

# SMART Goals

One way to evaluate your workplace campaign objectives is to be **SMART**: **S**pecific, **M**easurable, **A**chievable, **R**elevant, & **T**ime-Based.

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## **S** is for *Specific*

The first step in defining your fundraising goal is to make it specific. It's more than just saying, "we want to increase giving over last year." Being specific in the context of fundraising means being clear about your financial goal and what meeting that goal will do for the community.

Remember to share your goal in communications and during events, and be sure to make it visible to every employee.

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## **M** is for *Measurable*

Having a measurable goal means that when the workplace campaign is over, you will be able to measure your dollars raised, numbers of participants, average or per capita gift, percent participation, and returning participants.

**To determine whether your goal can be measured, consider:**

- How much you want to raise
- Who will be tracking the progress toward the goal
- How you will know when you reach or surpass your goal

Tracking is necessary for both the campaign coordinator and the participants, since it gives a clear picture on progress during the campaign. Not only is measuring your goal a great motivator, but it can also help boost team morale.

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## **A** is for *Achievable*

Your fundraising goal should be achievable—stay away from lofty, unattainable goals. You will need to consider any company changes that may affect campaign results, such as company re-organization or a change in the number of employees. Nothing brings down morale faster than not meeting your goal.

**Set up your team to win. Contact CHC for help setting a goal.**

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## **R** is for *Relevant*

You've established how much you need to raise and how you will measure it. Now it is time to identify the "why" behind your fundraising goal. Relevance is necessary for fundraising; maybe you've identified a community need you're trying to fill or you want to support a certain number of organizations.

Maybe you've joined CHC to build stronger, healthier communities and ensure individuals, children, and families are healthy. Maybe certain health challenges affect your employees and their loved ones, and your "why" is to provide healing and hope to those affected.

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## **T** is for *Time-Based*

The final factor to consider when creating your goal is time. Your campaign must have a firm start and end date. Having a timeline for your campaign also makes it easy to check your progress toward your goal. A visible deadline can be a powerful motivator for participants.

**When establishing your campaign timeline, consider:**

- Your start date
- Your end date
- Where you should be at important points during your campaign

Having a timeline can keep the campaign on track for success. If you're close to the end of the campaign and the donations aren't coming in, you'll know to amplify your fundraising and communication strategies.



# Analyze

Look at last year's performance to determine what worked as well as any opportunities for improvement. Review these areas:

## Last Year's Total

Number of employees	_____
Number of participants	_____
Number of leadership contributors (\$1,000 and above)	_____
Percent participation	_____
Total amount raised	_____
Average gift	_____
Per capita gift	_____
Corporate contribution/match	_____
Number of participants using payroll deduction	_____

Percent Participation =

$$\frac{\text{NO. OF PARTICIPANTS}}{\text{TOTAL NO. OF EMPLOYEES}}$$

Average Gift =

$$\frac{\text{TOTAL DOLLARS RAISED}}{\text{NO. OF PARTICIPANTS}}$$

Per Capita Gift =

$$\frac{\text{TOTAL DOLLARS RAISED}}{\text{TOTAL NO. OF EMPLOYEES}}$$



# Strategies to Consider

Setting realistic and achievable goals is important to hosting a successful workplace giving campaign. To meet your goals, focus on two strategies:

1. Increasing participation
2. Increasing the average gift amount

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## 1. Ways to increase participation

- Communicate! Make sure every employee is educated about how CHC and our charity partners are building stronger, healthier communities and how employees' contributions are making a difference.
- Ask each employee to submit a pledge form (online or paper) even if they do not contribute. This ensures each employee has the opportunity to review the form and make an educated decision.
- Remind employees that every gift makes a difference. Encourage non-participants to start donating \$1 per pay period. They are part of something bigger.
- Use incentives to encourage employees to log into the online pledge site or return pledge forms by a certain date.
- Promote competition among departments, teams, etc. Use the Tools for Engagement Guide for inspiration.
- Offer retirees an opportunity to contribute.
- Ask new employees to contribute as they are hired (new hire program).
- Encourage your company to offer a \$1 for \$1 match and publicize the match to your employees.

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## 2. Ways to increase average gift

- Hold separate educational meetings with your management and leadership teams prior to your campaign kick-off and ask them to set the pace for the campaign, leading by example.
- Hold educational meetings with all company employees.
- Dedicate specific meetings entirely to CHC and the workplace giving campaign. Meetings are less effective when combined with open enrollment or other pre-existing meetings.
- Use CHC charity partners, impact stories, and employee testimonials in employee educational meetings and employee communications.
- Encourage employees to give one hour's pay.
- Encourage your company to offer a financial match and publicize the match to your employees.
- Promote payroll deduction as the best way to give versus one-time contributions and special events.
- Ask employees to increase their contribution by a certain amount per pay period.
- Offer incentives to encourage giving at higher levels, including leadership giving of \$1,000 or more.
- Encourage employees to give a certain percentage of their salary.
- Encourage employees to increase gifts by a set percentage (5%, 10%, 15% etc.).
- Encourage employees to increase gifts by a set dollar amount (\$25, \$50, \$100, etc.)

# 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 (refer to page 3)

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

### DETERMINE YOUR GIVING POTENTIAL

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

## 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.