

**WORK SHEET**

# Goal Setting

YEAR \_\_\_\_\_

**Increase Participation for \$1 - \$499 Donors**

$$\frac{\text{(This Year) \# of donors}}{\text{(Last Year) Average gift}} \times \text{(This Year) \$1 - \$499 Donor Goal} =$$

**Increase Average Gift for \$1 - \$499 Donors**

$$\frac{\text{(Last Year) \# of donors}}{\text{(This Year) Average gift}} \times \text{(This Year) \$1 - \$499 Donor Goal} =$$

**Increase Number of Leadership Givers (\$500 - \$9,999)**

$$\frac{\text{\# of new Leadership Givers}}{\$500} \times \text{Minimum Leadership Gift} = \text{(This Year) New Leadership Giving} + \text{(Last Year) Leadership Giving} = \text{(This Year) Leadership Giving Goal}$$

**Increase Leadership Gift Average**

$$\frac{\text{(Last Year) \# of Leadership Givers}}{\text{(This Year) Average Leadership Gift}} \times \text{(This Year) Leadership Giving Goal} =$$

**Identify Tocqueville Giving Potential (\$10,000 +)**

$$\frac{\text{\# of new Tocqueville Donors}}{\$10,000} \times \text{Minimum Tocqueville Gift} = \text{(This Year) New Tocqueville Gift} + \text{(Last Year) Tocqueville Gift} = \text{(This Year) Tocqueville Goal}$$

**Employee Goal**

$$\text{(This Year) \$1 - \$499 Donor Goal} + \text{(This Year) Leadership Giving Goal} + \text{(This Year) Tocqueville Goal} = \text{(This Year) Employee Giving Goal}$$

**Total Goal**

$$\text{(This Year) Employee Giving Goal} + \text{(This Year) Corporate Giving Goal} + \text{(This Year) Special Events Goal} = \text{(This Year) Total Giving Goal}$$

**Employee Contributions**

$$\frac{\text{(This Year) \% Goal}}{\text{(This Year) Employee Giving Goal}} \times \text{(This Year) Total Employee investment} =$$