

Analyzing Your Campaign

Determining Your Campaign Potential

1. Giving Potential

Giving potential is a benchmark figure that represents an organization's departments, or individuals potential to give to the United Way Campaign.

It is calculated for an individual at the fair share giving standard of 1% of annual salary (i.e., Annual salary of \$30,000 x fair share standard of 1% = \$300 annual contribution). Potential figure for departments and organizations can be done in the same manner. A guide for evaluating the potential achieved of an organization is:

Excellent Achievement:	90% + of potential achieved.
Good Achievement:	60% to 90% of potential achieved.
Average Achievement:	30% to 60% of potential achieved.
Minimal Achievement:	Under 30% of potential achieved.

Opportunities for greatest campaign growth usually exists in the average achievement area.

2. Employee Participation

Employee participation is a figure that represents the amount of individual involvement in the campaign. Employee participation is calculated as a percentage of giving employees contributing to the United Way campaign out of the entire work force.

3. Average Gift Per Giver

Average gift per giver is calculated by dividing the total employee contributions by the number of employees giving. The relationship of employee participation and size of contribution to potential achieved is illustrated in the following Potential Achievement chart:

	Low ← % Potential Achieved → High	
High ↑ Number of Givers ↓ Low	High Involvement and Low Giving 3	High Involvement and High Giving 4
	Low Involvement and Low Giving 1	Low Involvement and High Giving 2
	Low ← Amount of Giving → Fair Share Standard	

In **Box 1** – Organization has a weak campaign effort or a campaign in the initial start up stage.

Box 2 – Relies on a few good steady givers but does not have an effort to increase the number of givers. This is a sign of a “routine campaign” effort.

Box 3 – Campaign asks all employees to get involved by giving something. Very high participation is often an indicator that campaign uses pressure rather than community needs as a solicitation strategy.

Box 4 – Organization has good involvement and good giving amounts. Usually indicates a well rounded campaign with good employee understanding and involvement at top management and other levels in the organization.

Key Facts to Identify When Conducting a Campaign Analysis

- Compare the % change in number of employees with the % change in number of givers.
- Compare the % change in number of employees with the % change in total employee dollars.
- How does the average gift compare with the employee per capita?
- How are your leadership giving results impacting your average gift and per capita?
- Analyze the number of leadership givers and leadership giving dollars for the past 3 campaigns.
- What % of total employee dollars is made up of leadership giving dollars?
- What % of total givers are leadership givers?
- Compare the % participation, average gift, etc. of Executive/Sr. Management with the overall campaign.
- Do you solicit retirees? If so, what % of the total employee dollars are made up of retiree contributions?
- What % of the overall campaign is made up of payroll deduction contributions? Cash contributions? Direct bill contributions?
- How does the average payroll deduction gift compare with the average cash and bill direct gift?
- What % of the overall campaign is made up of non designated gifts?
- What % of the campaign is designated to non-United Way agencies? How has that figure changed over the last 3 campaigns?
- If you increased the number of givers to _____ while keeping the average gift the same, you would raise \$ _____ new dollars.
- If you increased the average gift to \$ _____ while keeping the % participation the same, you would raise \$ _____ new dollars.
- What % of the campaign is designated to other United Ways?

Calculations Formulas:

1. **% Participation** = # Givers divided by # employees.
2. **Average Gift** = Total Employee \$ divided by # givers.
3. **Per Capita** = Total Employee \$ divided by # employees
4. **Employee Potential (\$)** = Total # employees x avg. annual salary (\$) x .01
5. **Potential Achieved** = Total employee contribution divided by total employee participation.

Your United Way contact person can assist you in conducting a Campaign Analysis.

How To Increase Level of Giving

A. When Setting a Goal

1. Calculate the total you wish to achieve.
2. Divide it by the total employment.
3. Share with employees what the gift per employee would be.

Examples: If everyone in our company, at a minimum, would give \$5 per paycheck we could raise \$4,000,000.

B. When Training Your Committee and Solicitors

1. Emphasize the goal is to increase giving.
2. Teach them how to ask people to increase their gifts.

C. When Promoting the Campaign

1. Emphasize how increasing individual gifts makes an impact.
2. Use incentives tied to giving such as a special gift for increased giving.

D. During group meetings

1. Be sure to share the campaign goal.
2. Avoid saying things like, "If you're already giving you don't have to sign up or just write 'same' on the card."
3. Ask for employees to increase their gift on their pledge cards (remember small increases add up).

E. Recognition

1. Recognize employees who increased their gifts on bulletin boards, in newsletters, within departments.
2. Do a special "Thank You" for employees who increased their gifts.

How To Increase Participation

A. Committed CEO

1. Involved financially and/or personally to the United Way
2. Provides time and support to the campaign committee
3. Provides time and personal support to employee meetings

B. Committed Top Managers

1. Own personal involvement
2. CEO or peer contact

C. Labor/Union Endorsement

D. Committed Internal Campaign Structure

This could be in the form of campaign committee representing all departments.

1. Marketing/Public Relations
2. Payroll
3. Line People
4. Middle Management
5. Human Resources
6. Upper Management
7. Labor

E. Clear and Open Line of Communication

1. Between CEO/campaign committee
2. Between campaign committee and employees
3. Between campaign committee and the United Way

F. Conduct an Employee Survey about the United Way

1. Find out what employees need to know about United Way
2. Implement results

G. Train and Educate Campaign Committee Concerning

1. United Way
2. Community needs and how they can meet those needs
3. Allocations
4. Volunteerism
5. New hire's program
6. United Way at Work
1. Explanation of the correlation between campaign giving and participation.

H. Analyze Past Campaign

1. Overall company campaign
2. Departmental campaign

Example: Looking at the number of participants versus the number of employees.

I. Develop Goals Based on Increased Participation.

1. Departmental goal
2. Company goal

J. Motivate/Educate Employees

1. Use of campaign materials
 - a. posters
 - b. thermometer
 - c. payroll stuffers
2. Introduce United Way campaign theme
3. Tours
4. Have two levels of incentives
 - a. New givers
 - b. Current givers
5. Introduce the idea of team-spirited competition between departments

K. Group Meeting

1. Set time and date or dates where management can endorse the company's involvement with the campaign.
2. Departmental representative speak on behalf of the committee and the United Way explaining the plan of action.
 - a. Goal
 - b. Theme
 - c. Incentive program
 - d. Community needs
3. Speaker
4. Testimonial
5. Video
6. Personalized pledge card
7. ASK!

L. Thank You / Recognize Those Who Help Make the Campaign a Success

1. CEO
2. Upper management
3. Middle management
4. Line employees
5. Campaign Committee

Examples: Thank you lunch, Have the CEO cook, Pass out awards, Recognize departments, Pass out incentive gifts, Attend United Way luncheons.

M. Immediately evaluate and measure the results of your campaign with those involved.

1. CEO
2. Campaign committee
3. United Way staff person

N. Rotate, Elevate, and Draw in New Employee Representatives to the Company Campaign Committee

O. United Way Staff will Remain in Contact with Committee Year-Round

1. Distribute United Way e-newsletter
2. Schedule Brown Bag seminars
3. Get involved with the Volunteer Center
4. Ask new hires to contribute to United Way throughout the year



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