



United Way
of the Central & South
Okanagan/Similkameen

Goal Setting Worksheet

Our goals can only be reached through a vehicle of a plan, in which we must fervently believe, and upon which we must vigorously act. There is no other route to success.

Stephen A. Brennan

Employee Contributions

1A) Goal= (Number of Employees x Percent Participation) X Average gift Amount

_____ x _____ X _____

2A) For a more thorough analysis of your goal you can breakdown contributions from

leaders and non-leaders.

of Leaders: _____ x Avg. Gift: _____ = Leader\$ _____

of Non-Leaders: _____ x Avg. Gift _____ = Non Leader \$ _____

Employee Total (Leader \$ + Non-Leader \$) = _____

B) Special Event \$ _____

Financial Goal (1A or 2A) _____ + **(B)** _____ =

Activity Goals

Participation Rate

Last year: _____

This year: _____

Employee Presentations

Last year: _____

This year: _____

Target groups: _____

Canvasser Training

Number of Canvassers: _____

Training Date: _____

Leadership Presentation

Last year: _____

This year: _____

Target groups: _____

Agency Tour or Day of Caring

Targeted Employee Groups (New Hires, Retirees, Contractors)

Target group: _____ Engagement Ideas: _____

Preference: _____

You become successful the moment you start moving toward a worthwhile goal.

Unknown