

**HANDOUT: Resource Development Staff Performance & Measurement Instrument**  
**March 3, 2015 ▪ Prepared by: Tycely Williams, CFRE**

**Objective:** To support the resource development strategies of INSERT in order to INSERT MISSION.

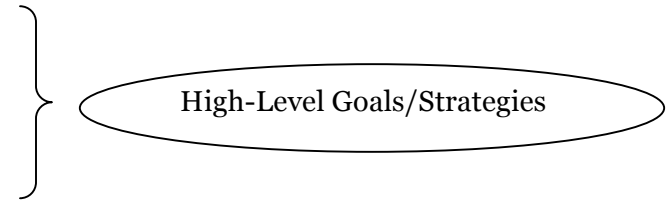
**Sample Objective:** To support the resource development strategies of the American Red Cross in order to prevent and alleviate human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors.

**FY 2015 Financial Goal:** To secure through contributions, grants, etc. [specify based upon your revenue streams] \$500,000 [insert based upon your overall financial goal] from January to December [specify based upon your fiscal year] with collaboration and support from internal stakeholders.

**2015 Goals At-Glance [customize based upon your revenue stream]**

**Contributions**

Board	\$10,000	Aim: 100% participation
Staff	\$ 5,000	Aim: 100% participation
General	\$270,000	Aim: 250 renewals, 100 upgrades & 50 new donors

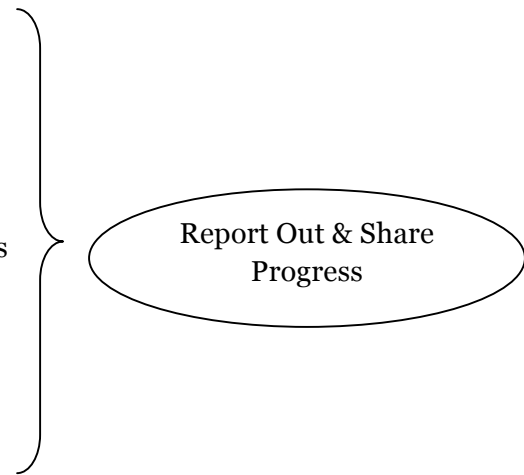


**Grants**

Private Grants	\$70,000	Aim: 4 renewals, 2 new grants
Public Grants	\$65,000	Aim: 3 renewals, 1 new grant

**Corporate**

Contributions	\$20,000	Aim: 10 renewals, 5 upgrades & 6 new donors
United Way Campaign	\$10,000	Aim: 2,000 renewals & 100 new donors
Matching	\$5,000	Aim: 20 renewals, 10 upgrades & 10 new



**Events**

Ticket Sales	\$20,000	Aim: 200 tickets (\$100 each)
Sponsorships	\$15,000	Aim: 1 at \$10,000 & 2 at \$2,500
Auction	\$10,000	Aim: 1 item at \$1,000, 5 items at \$500, 10 items at \$100 &

Total	\$500,000	Impact: Insert projected programmatic outputs
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**Evaluation of Engagement:**

- Inform staff members of expectation (all internal stakeholders will support resource development)
- Define how staff members will be evaluated (include frequency—i.e. quarterly, semi-annual or annual)
- Collapse resource development evaluation into overall performance review (tied to compensation & merit increases)
- Encourage staff members to shape the instrument prior to the adoption
- Operationalize by crafting policies and procedures to reflect the new culture
- Provide informal reviews, give guidance & direction
- Conduct formal review face-to-face and document using a written instrument
- Encourage organizational and volunteer leaders to enforce and to lead by example

Demonstration of Resource Development Support    Yes:         No:

Current Year Donor:    Yes:         No:

<b>Fundraising Strategy</b>	<b>Identification</b>	<b>Cultivation</b>	<b>Solicitation</b>	<b>Stewardship</b>	<b>Notes</b>
Board Contribution				x	Hand-written note to board member
Staff Contribution					Made personal contribution
General Contribution	x				Provided names of prospects
Private Grants					
Public Grants				x	Wrote thank you letter to agency
Corporate Contributions					
United Way	x	x		x	Encouraged neighbor to give
Corporate Matching					
Ticket Sales	x		x		Asked friend to attend
Sponsorship	x	x	x		Asked car dealer to support
Auction	x	x	x		Secured item

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