THE ASSOCIATED's
Outcomes Measurement Document
FY2012

THE ASSOCIATED is committed to ensuring that all encounters with donors and volunteers are intentional and transformative. All program efforts and initiatives are developed around shared goals and objectives, leading participants to become more deeply connected and invested in THE ASSOCIATED system. This tool is a guide to be used by professional and lay partners to develop a road map for the year.

Program/Initiative Name:
Program/Initiative Chair:
Program/Initiative Co-Chair:
Lead Professional:

Overall Goal of the Effort:

THE ASSOCIATED's integrated approach to development focuses on five products. Please indicate and consider which of the following will be integrated into the effort:

- ❒ Annual Campaign
- ❒ Philanthropic Funds
- ❒ Engagement & Leadership
- ❒ Legacy & Endowment
- ❒ Supplemental Funding

Goals & Action Steps

Four key objectives must be developed in planning and implementing each initiative. These include:

- **Involvement:** Who is your target audience (i.e. high-potential donors, families with young children)? New or existing donors? How many people?
- **Content:** What content will be included to move participants to feel or think differently?
- **Follow Up:** After participation, what will people do? How will they be involved? How will this be done?
- **Financial Resource Development (FRD):** After or during participation, what role will philanthropic giving play?

Goals in each area should be **SMART** (Specific, Measureable, Achievable, Relevant and Timely) and include major action steps that will help achieve these goals.

Involvement

Responses in this section should articulate the most significant goals and action steps for ensuring that the *right* people are being recruited for the initiative. Answer the following questions: Who is your target audience (i.e. high-potential donors, families with young children)? New or existing? How many people?

Goal #1:

Major Action Steps for Goal #1:
(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Goal #2:

Major Action Steps for Goal #2:
(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Content

Use this section to articulate how participants will be thinking or feeling differently as a result of the effort. Goals are provided. Please determine action steps.

Goal #1: Participants will gain increased knowledge of THE ASSOCIATED system.

Major Action Steps for Goal #1:
(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Goal #2: Participants will feel more passionately about the Jewish community and their involvement.

Major Action Steps for Goal #2:
(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Follow Up

Use this section to articulate where participants will be moved after completion of the initiative. Please indicate action steps. Answer the following questions: After participation, what will people do? How will they be involved? How will this be done? Goal #1 has been provided.

Goal #1: After participation in this initiative, participants will become more deeply involved with THE ASSOCIATED.

Major Action Steps for Goal #1:

(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Goal #2:

Major Action Steps for Goal #2:

(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Financial Resource Development (FRD)

Responses in this section should include goals for philanthropic giving. Goal #1 is provided.

Goal #1: Participation in this effort will result in either a new or upgraded contribution to the Annual Campaign.

Major Action Steps for Goal #1:

(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Goal #2:

Major Action Steps for Goal #2:

(Next to each action step, indicate the expected date of completion.)

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To what extent was the goal met? Why?

Results Summary

Leadership should use this section to summarize efforts upon completion of the initiative and make recommendations for future efforts.

Program/Initiative Strengths:

Opportunities for Improvement:

New Ideas to Consider:

Please indicate those goals that were not completed and why:

Top Participants:

Please list the names of any participants you believe THE ASSOCIATED should make an extra effort to keep involved with our work. How will this be done?

Please save a copy of this form for your records and email to lpomerantz@associated.org

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THE ASSOCIATED

THE ASSOCIATED's CENTER FOR COMMUNITY ENGAGEMENT & LEADERSHIP