



AmpliFund




AmpliFund Core Series Training 3:

Performance Plan Creation and Achievement Entry

Agenda

- Welcome and Introductions
- Master Data Revisit
- Functionality
 - Grant Overview
 - Performance Plans
 - Achievements
 - Tracking Periods
 - Custom Views
- Key Takeaways and Action Items
- Question and Answer

Core Series Overview

- Training 1: Introduction to AmpliFund and Research
- Training 2: Grants Overview
-  • Training 3: Performance Plan Creation and Achievement Entry
- Training 4: Budget Creation and Expense Entry
- Training 5: Master Data

Setting up master data elements that have a major role in grant performance plan creation:

- Staff
 - People at your organization who can receive AmpliFund emails and may be assigned responsibility for items

The screenshot shows the AmpliFund web application interface. The top navigation bar includes the AmpliFund logo and the user name 'Emma Jacksonville'. Below the navigation bar is a breadcrumb trail: Back, Details, Analytics, Pre-Award, Post-Award, Tools, Grant Workflow, Custom. The main content area is titled 'Active Living: Bicycle and Walking Trails – Performance Plan'. A table lists various performance plan items with columns for Name, Goal Type, Responsible Individual, and Strategy. A dropdown menu is open for the 'Responsible Individual' column, showing a list of names: John Boulder, Karl Dallas, Karl Dallas, John Boulder, James Aspen, and James Aspen. The dropdown menu is highlighted with a green rounded rectangle.

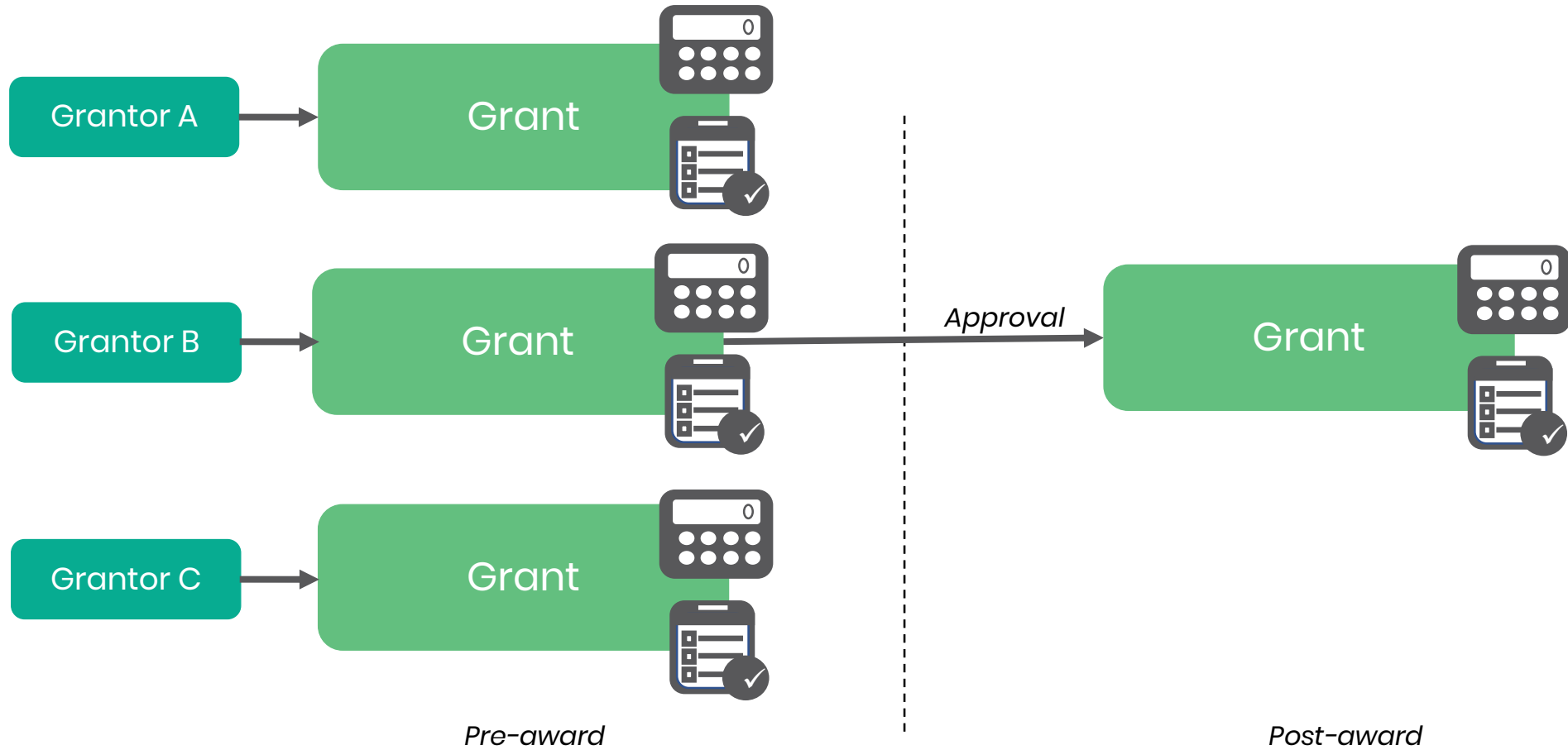
Name	Goal Type	Responsible Individual	Strategy
Accessibility	Milestone	John Boulder	Safety
Build Trails	Reimbursement	Karl Dallas	walking trails
Development Form Due	Milestone	Karl Dallas	
Enrollment	Milestone	John Boulder	
enrollment completed	Milestone	James Aspen	Enrollment
Expand Media Coverage	Percentage Changed	James Aspen	Outreach and Media

Master Data Elements

Data Element	Grants	Performance Plans	Budgets / Expenses
Organizations	✓		
Individuals			
Staff	✓	✓	✓
Compensation			✓
Subjects	✓		
Budget Categories			✓
Benefit Types			✓
Departments	✓		
GL Accounts			✓

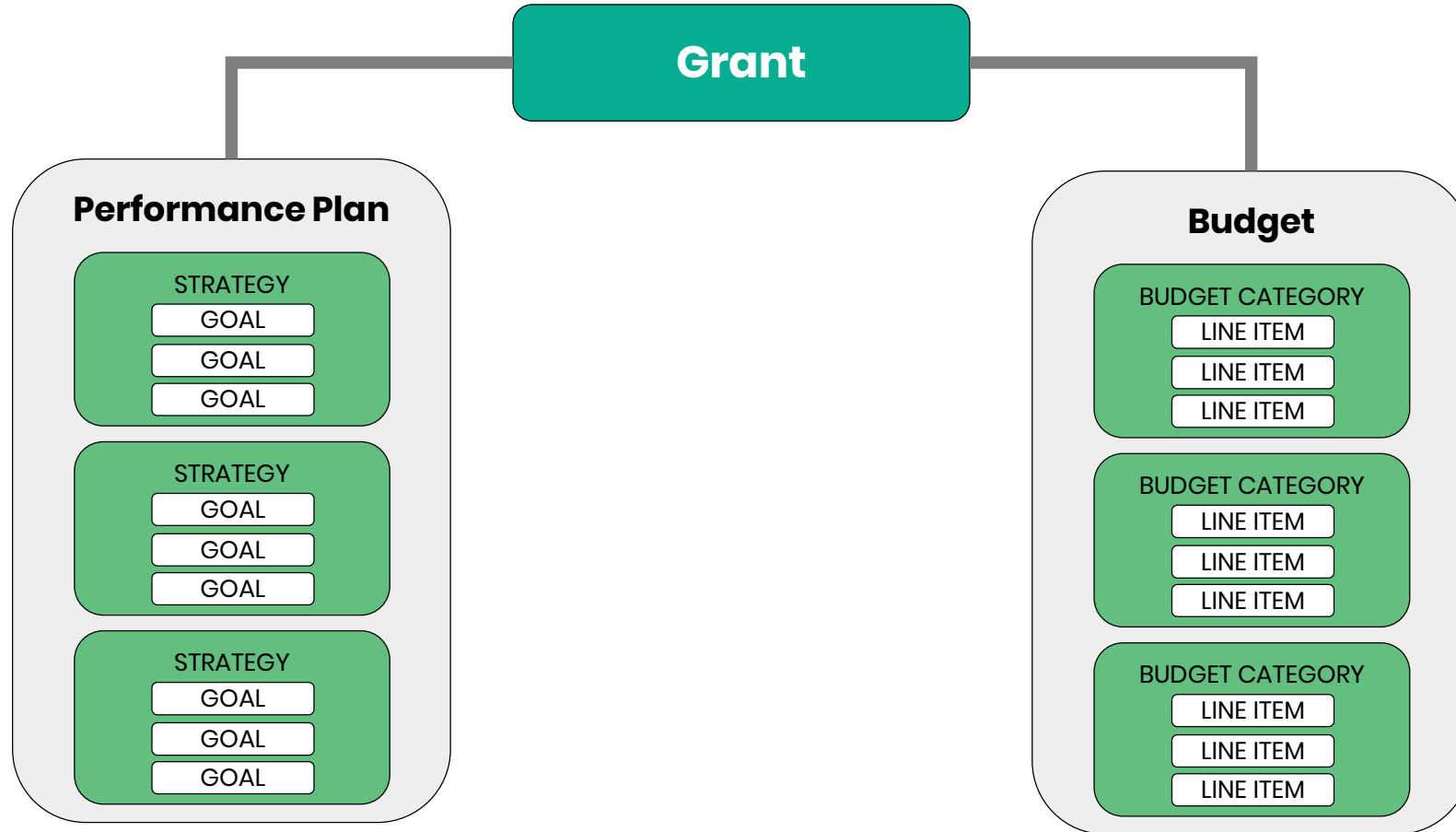
Grant Overview

Manage Grant Records

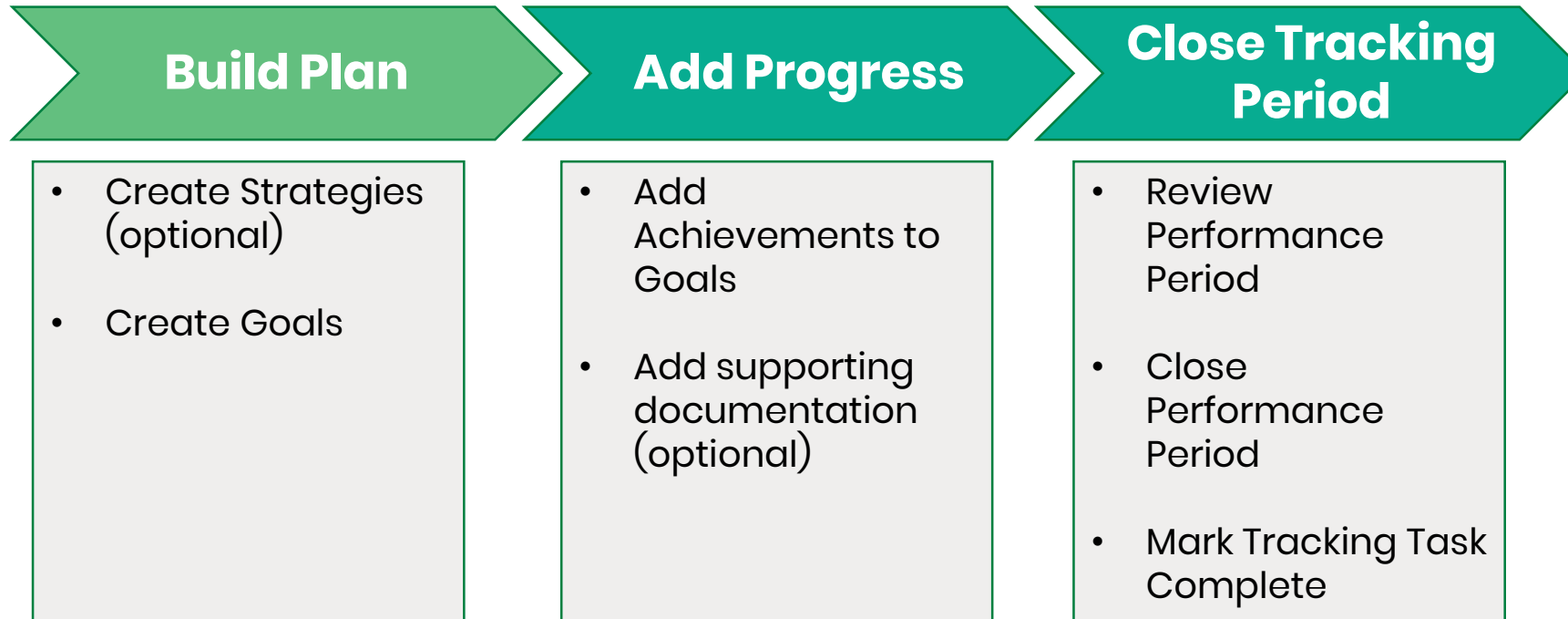


Grant Overview

Plan Budget and Performance



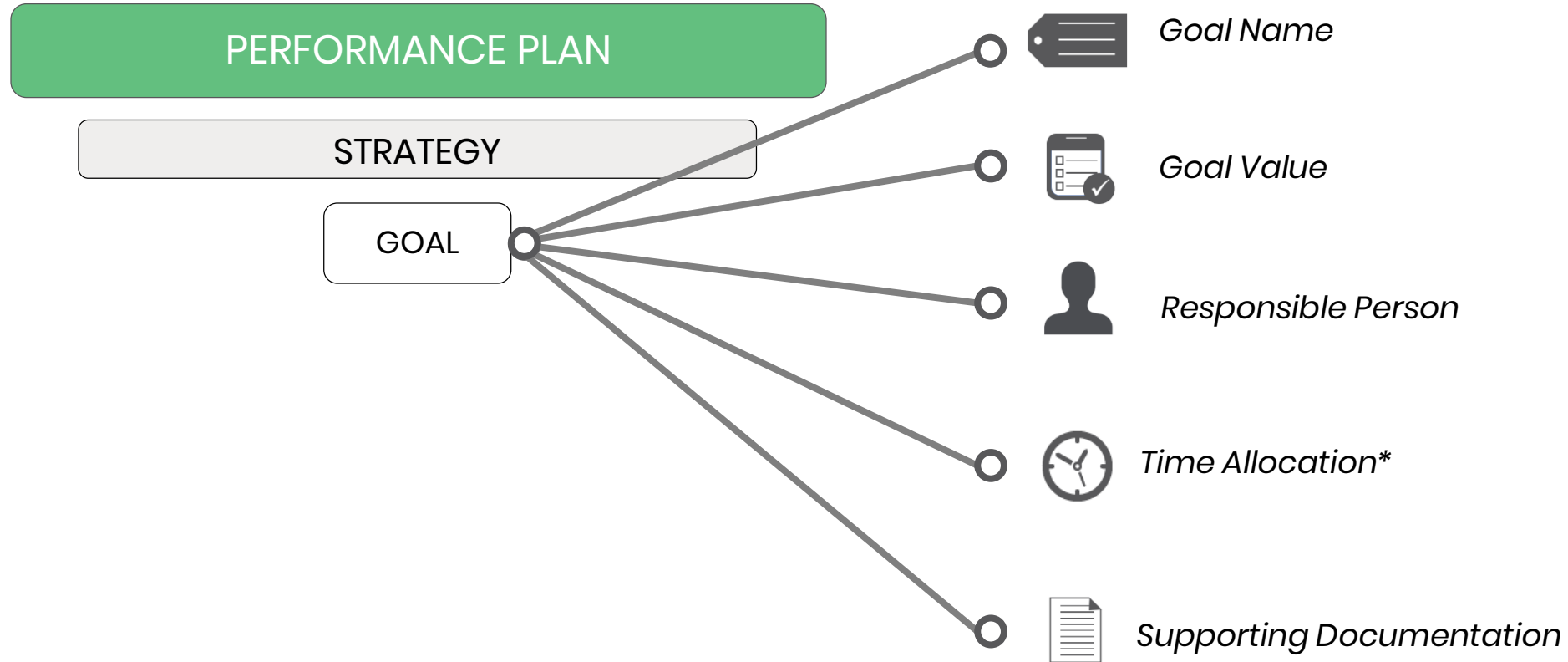
Performance Plan Overview



Tracking Period frequency is set on the **Grant Settings** page and may be: Monthly, Quarterly, Semi-Annually, or Annually

Performance Plan: Goals

Manage Performance Plans



*Allocations available for Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement Goal types

Performance Plan: Goal Types

AmpliFund

Emma Jacksonville

Back Details Analytics Pre-Award Post-Award Tools Grant Workflow Custom

Active Living: Bicycle and Walking Trails – Performance Plan

Drag a column header and drop it here to group by that column

Name ▲	Goal Type	Responsible Individual	Strategy
Accessibility	Milestone	John Boulder	Safety
Build Trails	Reimbursement	Karl Dallas	walking trails
Development Form Due	Milestone	Karl Dallas	
Enrollment	Milestone	John Boulder	
enrollment completed	Milestone	James Aspen	Enrollment
Expand Media Coverage	Percentage Changed	James Aspen	Outreach and Media

Goal Types

- Milestone
- Narrative
- Numeric
- Reimbursement
- Percent Changed
- Percent Achieved

Performance Plan: Goal Types

Goal Type	Definition	Example
Milestone	The most basic goal type. They allow for tracking progress as a “Yes” or “No” response by the Responsible Individual.	Create and send Q1 Staff Survey.
Narrative	Question and answer goals. Responsible Individuals may answer the question posed by the goal.	How successful was the grant-related activity this period?
Numeric	A discrete number to achieve. As units of the goal are completed, Responsible Individuals may record units completed.	“Number of program participants” with a goal target of 50.

Performance Plan: Goal Types

Goal Type	Definition	Example
Percent Achieved	Goals to reach a desired percent. When tracking progress against a percent achieved goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Volunteer Retention Rate” with a goal target of 70%.
Percent Changed	Goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, Responsible Individuals may capture Total Possible and Total Achieved percentages.	“Decrease in Student Absences” with a starting absentee rate of 10% and a goal absentee rate of 3%.
Reimbursement	Goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, Responsible Individuals may enter Units Achieved.	“Number of Patient Screenings” with target/maximum units of 100, and a reimbursement rate per unit of \$22.

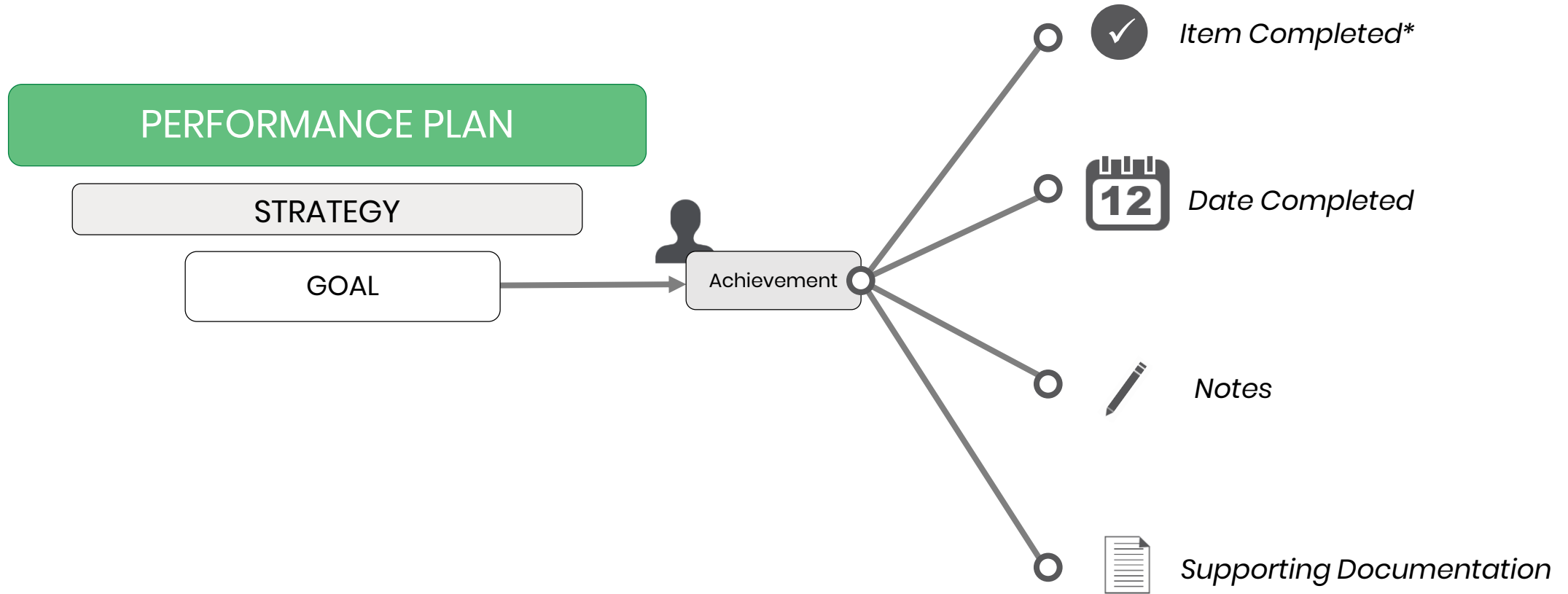
Performance Plan: Activity Center

Page	Description
Calendar	Every user's homepage; each user can view items assigned to them on the calendar
Message Center	Provides access to messages sent through AmpliFund
Events	Important dates in a grant's lifecycle as entered on a grant details page; events do not require any action to be taken; they simply serve as reminders
Tasks	Tasks track the completion of important grant management-related responsibilities that are not achievements or expenses
Achievements	Progress accomplished against a planned grant programmatic goal
Expenses	Tracks dollars spent against a planned grant budget line item. Expenses are added towards the defined grant budget line items
Tracking Periods	Segmented periods of a grant, typically corresponding to funder reporting requirements

User Specific Section: non-Organization Admin users see only the items they are responsible for in the Activity section.

Performance Plan: Goals

Manage Performance Plans



*Item completed formatting is determined by goal type: i.e. a number completed, an answer to a question, etc.

Performance Plan: Achievements

AmpliFund Emma Jacksonville ▾

Back ▾ 🖨️ ⓘ 📖

Drag a column header and drop it here to group by that column

Activity Name ▾	Grant Name ▾	Goal Type ▾	Responsible Individual ▾	Start Date ▾	End Date ▾
Develop Vacant Lot Pocket Park Plans 🏗️ +	Community Development Block Grants (Ohio)	Milestone	Karl Dallas	7/1/2016	6/30/2021
Obtain Competitive Contractor Bids for Commerical Projects 🏗️ +	Community Development Block Grants (Ohio)	Numeric	Keith Austin	7/1/2016	6/30/2021
Develop Revitalization Plan 🏗️ +	Community Development Block Grants (Ohio)	Milestone	Keith Austin	7/1/2016	6/30/2021
Yellowfield Neighborhood Property Razing (15) 🏗️ +	Community Development Block Grants (Ohio)	Numeric	Kerry Houston	7/1/2016	6/30/2021
Yellowfield Neighborhood Inspections (300) 🏗️ +	Community Development Block Grants (Ohio)	Numeric	Kerry Houston	7/1/2016	6/30/2021
Hold 12 Monthly Local Citizen Meetings 🏗️ +	Community Development Block Grants (Ohio)	Numeric	Kerry Houston	7/1/2016	6/30/2021
Submit report on status 🏗️ +	Community Development Block Grants (Ohio)	Milestone	Matt Athens	7/1/2016	6/30/2021

Activity

- 📅 Calendar
- ✉️ Message Center
- 📅 Events
- 📋 Tasks
- 🔄 Workflow
- 🏗️ Achievements
- 💰 Expenses
- 📅 Timesheets
- ▶ Timesheet Approvals
- 📄 Payment Request Approvals
- ▶ Tracking Periods
- 📄 Reporting Periods

👤 Contacts

Activity → Achievements

Achievements are progress marked against a performance plan goal

- View all achievements against a performance plan goal
- Add new achievements to a performance plan goal

Tracking Periods

AmpliFund Emma Jacksonville

Back Tracking Periods

Active Living: Bicycle and Walking Trails - Tracking Periods

Start: 12/1/2018 End: 2/28/2019

Status: Open

Achievements

Overall Achievements Details

Number of Goals with No Achievements: 16

Comments

Attach Documentation

Attach Documentation

Achievements Analytics

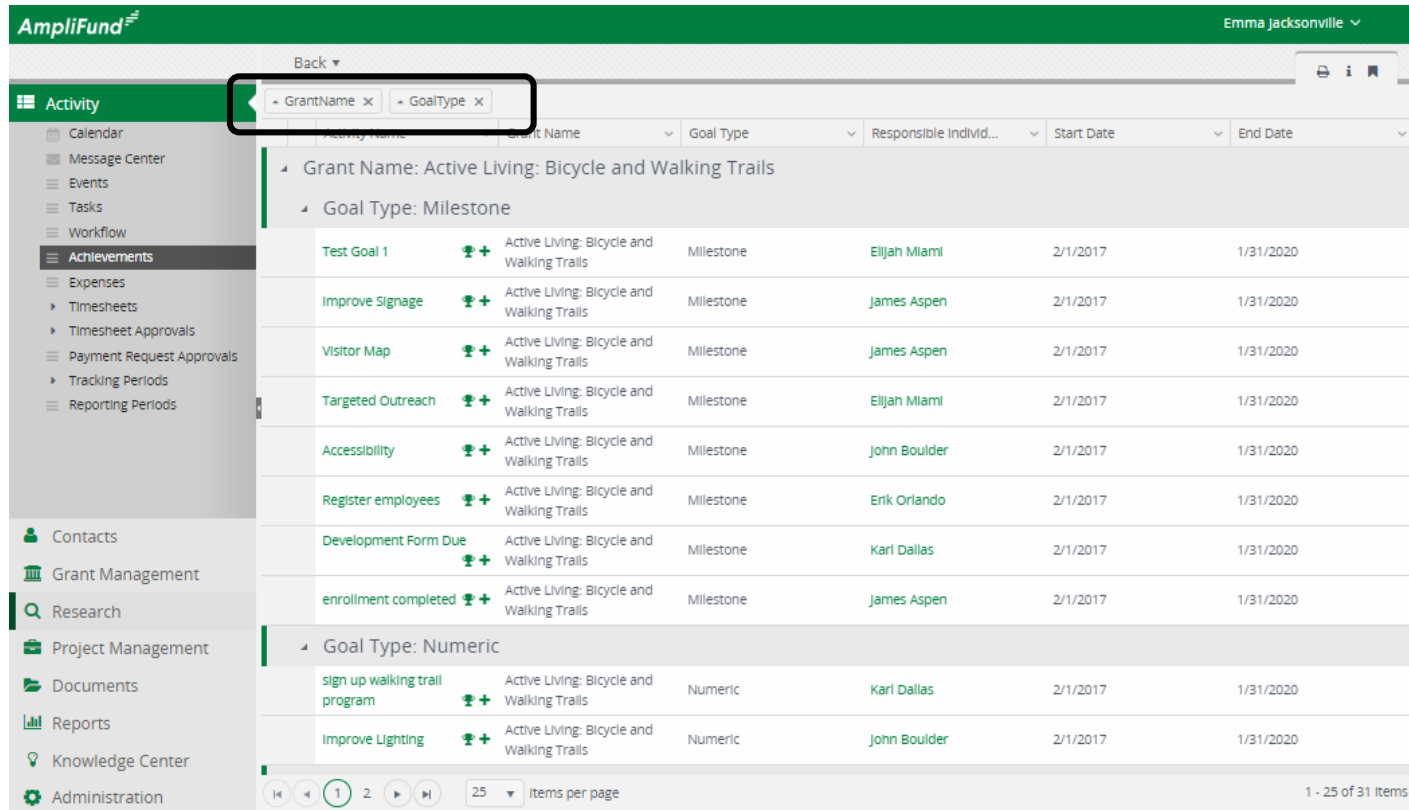
Activity → Tracking Periods

Tracking Periods offer the ability to review all achievements submitted within a period and closeout

- Analytics provide metrics of planned goals versus actual achievements

Custom Views

Views provide an alternative method to configure data in a meaningful way to the user. Views can be saved for future use or exported for further manipulation.



The screenshot displays the AmpliFund interface with a custom view configuration. The top navigation bar shows the user 'Emma Jacksonville'. The left sidebar contains various menu items, with 'Achievements' selected. The main content area shows a table of activities with columns for Grant Name, Goal Type, Responsible Individual, Start Date, and End Date. The table is filtered by 'Grant Name: Active Living: Bicycle and Walking Trails' and 'Goal Type: Milestone'. A red box highlights the filter configuration area at the top of the table, showing 'GrantName' and 'GoalType' filters. Below the table, there is a section for 'Goal Type: Numeric' with two rows of activities. The bottom of the page shows a pagination control with '1' selected and '25' items per page.

Grant Name	Goal Type	Responsible Individual	Start Date	End Date
Grant Name: Active Living: Bicycle and Walking Trails				
Goal Type: Milestone				
Test Goal 1	Milestone	Elijah Miami	2/1/2017	1/31/2020
Improve Signage	Milestone	James Aspen	2/1/2017	1/31/2020
Visitor Map	Milestone	James Aspen	2/1/2017	1/31/2020
Targeted Outreach	Milestone	Elijah Miami	2/1/2017	1/31/2020
Accessibility	Milestone	John Boulder	2/1/2017	1/31/2020
Register employees	Milestone	Erik Orlando	2/1/2017	1/31/2020
Development Form Due	Milestone	Karl Dallas	2/1/2017	1/31/2020
enrollment completed	Milestone	James Aspen	2/1/2017	1/31/2020
Goal Type: Numeric				
sign up walking trail program	Numeric	Karl Dallas	2/1/2017	1/31/2020
Improve Lighting	Numeric	John Boulder	2/1/2017	1/31/2020



AmpliFund



AmpliFund In-Product Review

www.gotomygrants.com

Key Takeaways

- Performance Planning & Deliverables
 - What is it you said you were going to do?
 - How will you make it measurable?
 - Who are the responsible individuals involved with these goals?
- Lifecycle of Performance Plan Goal
 - Understand Creation
 - Marking progress against: Achievements
 - Closeout: Tracking Periods
- Reporting against Goals and Achievements

Action Items to Complete

- Create a Performance Plan with using multiple goal types

How to prepare for the next session

- Gather budget and basic financial information for your grant



AmpliFund 



Question & Answer

Post Implementation Support

Submit a support ticket:

support@amplifund.zendesk.com

Visit the support portal:

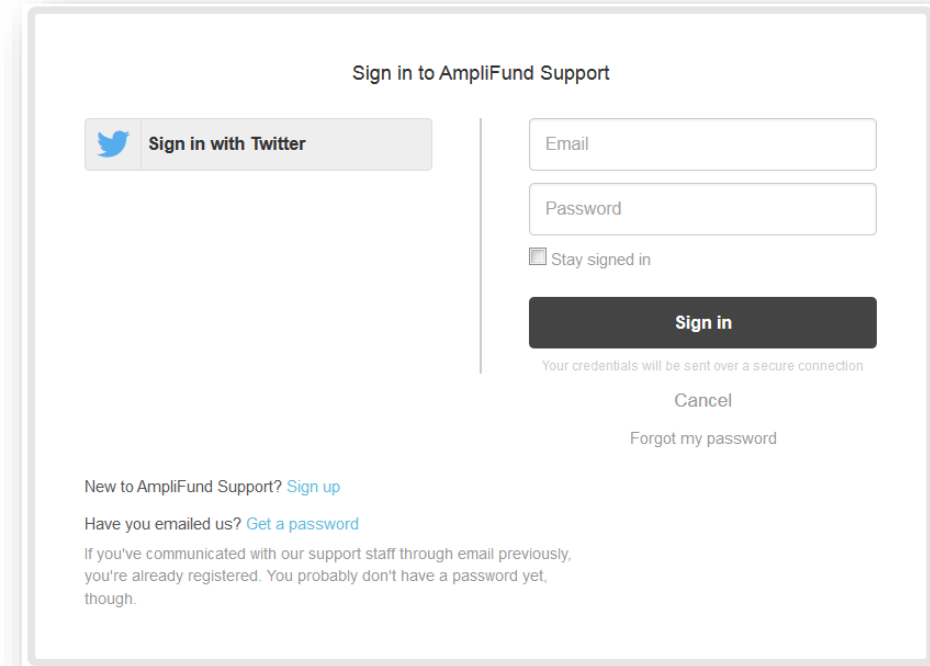
<https://amplifund.zendesk.com>

Supported Browsers:


- Google Chrome (current supported releases)
- Mozilla Firefox (current supported releases)
- Microsoft Edge (current supported releases)
- Microsoft IE 11 +
- Apple Safari 10+

AmpliFund Support Site

1. Go to <https://amplifund.zendesk.com>
2. Click the **Sign up** link
3. Enter your **full name**
4. Enter your **email address**
5. Complete the **I'm not a robot** check
6. Click the **Sign up** button
7. A welcome email from support@zendesk.com will be sent to you via email
8. Click the link to set your password



Sign in to AmpliFund Support

 Sign in with Twitter

Email

Password

Stay signed in

Sign in

Your credentials will be sent over a secure connection

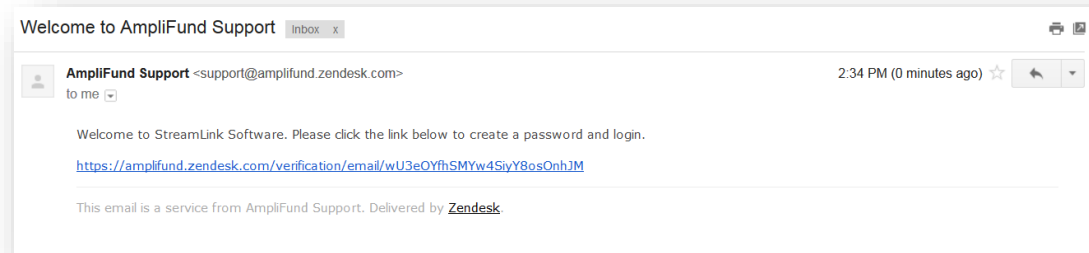
Cancel

[Forgot my password](#)

New to AmpliFund Support? [Sign up](#)

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.



AmpliFund Support Site

AmpliFund

Have a question about AmpliFund? Search our support site.

- Release Notes**
Weekly announcement of enhancements, updates, and fixes in AmpliFund
- User Guides**
AmpliFund User Guides and Quickstart Guides for download
- Instructions**
Step-by-step instructions on using AmpliFund's features
- Upcoming Training and Videos**
Live training events and videos on how to use AmpliFund
- Import Templates**
Excel templates for importing data into AmpliFund
- FAQs**
Frequently Asked Questions about using AmpliFund
- Submit a Ticket**
Still need help? Submit a request to our help desk.

Reference Materials & URLs

Reference Materials

- User Interface Navigation Guide
- Contact Management Guide
- Administration Guide
- Security Roles Matrix

AmpliFund URLs

- www.gotomygrants.com
- <https://amplifund.zendesk.com>