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

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- 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

Master Data Revisit

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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

Master Data Elements

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

Grant Overview

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Manage Grant Records

Pre-award

Post-award

Approval

Grant Overview

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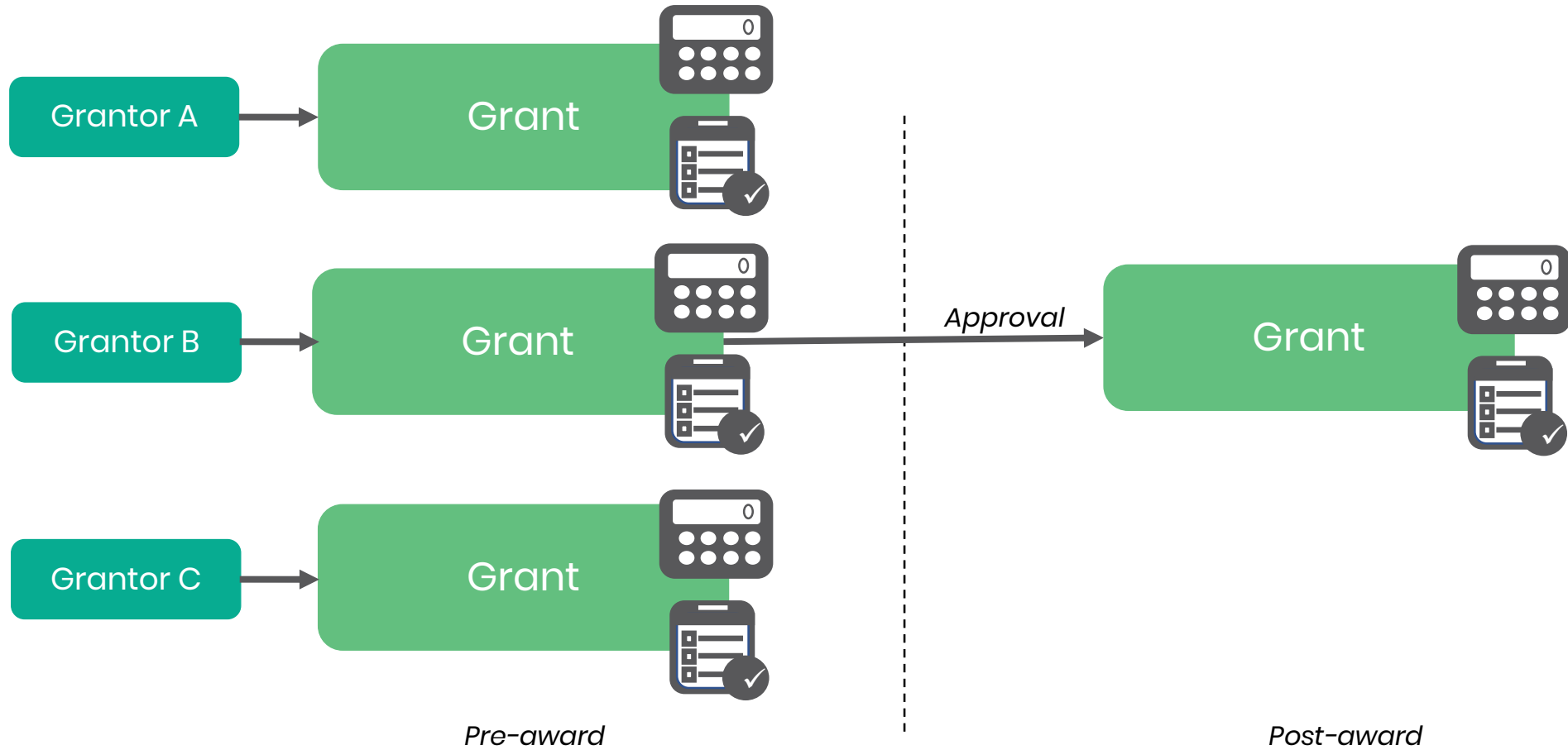
Plan Budget and Performance

Grant

Performance Plan

STRATEGY
- GOAL
- GOAL
- GOAL

STRATEGY
- GOAL
- GOAL
- GOAL

STRATEGY
- GOAL
- GOAL
- GOAL

Budget

BUDGET CATEGORY
- LINE ITEM
- LINE ITEM
- LINE ITEM

BUDGET CATEGORY
- LINE ITEM
- LINE ITEM
- LINE ITEM

BUDGET CATEGORY
- LINE ITEM
- LINE ITEM
- LINE ITEM
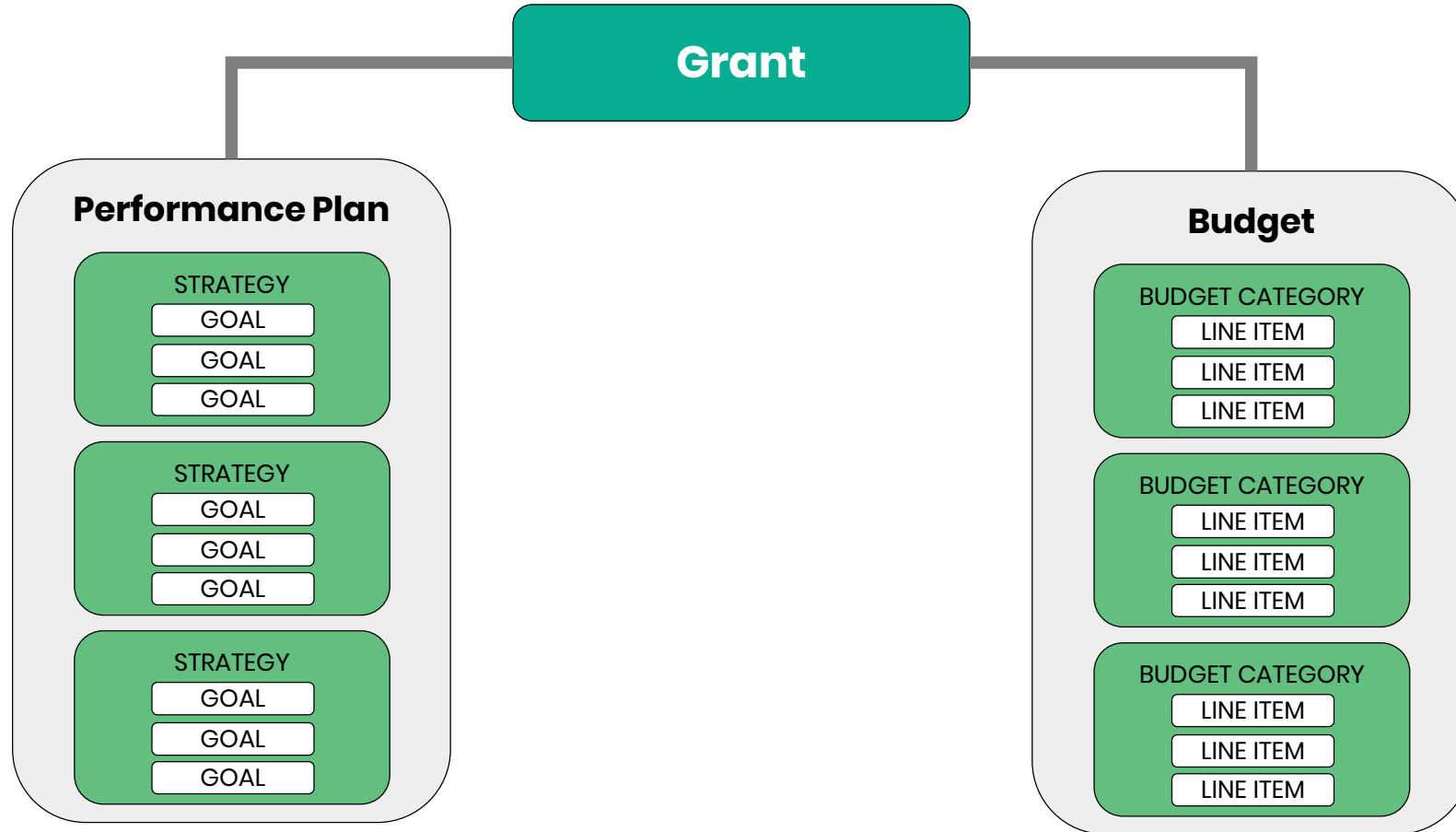
Performance Plan Overview

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Build Plan

- Create Strategies (optional)
- Create Goals

Add Progress

- Add Achievements to Goals
- Add supporting documentation (optional)

Close Tracking Period

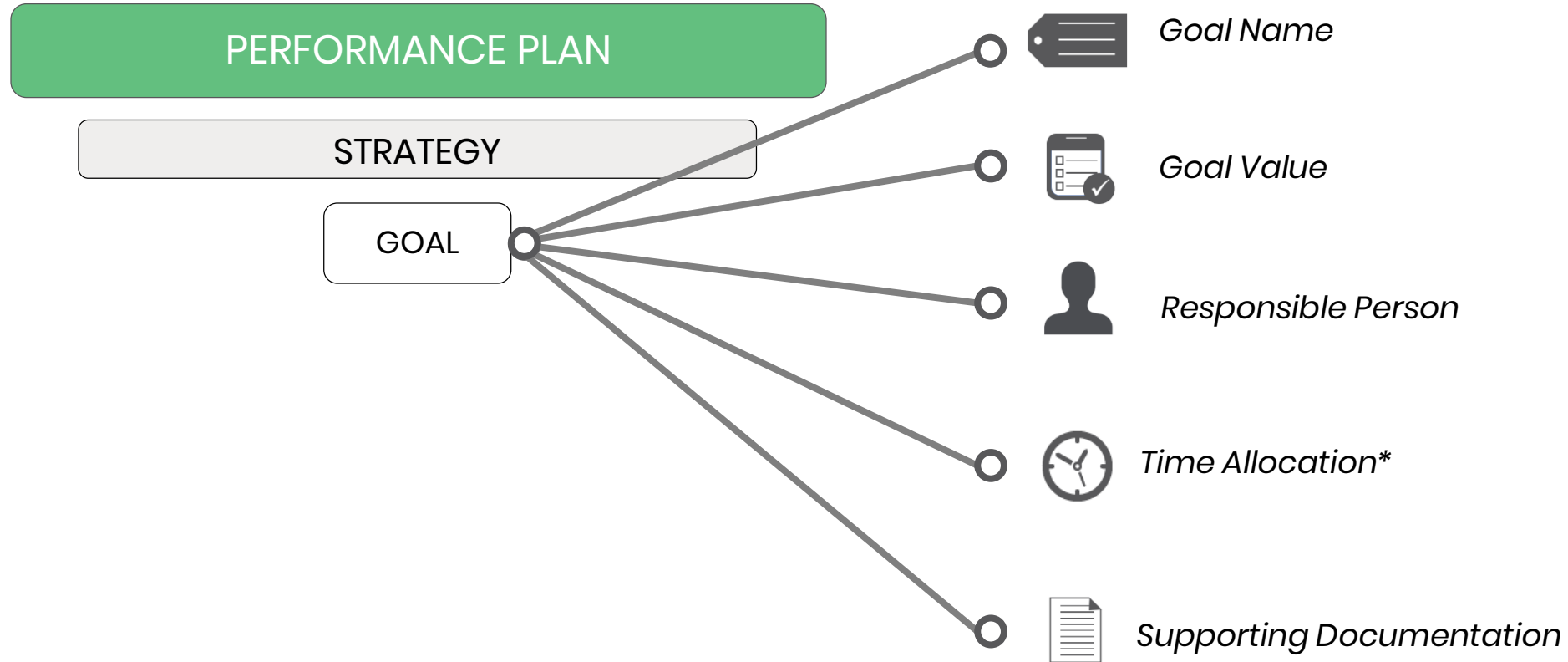- Review Performance Period
- Close Performance Period
- Mark Tracking Task Complete
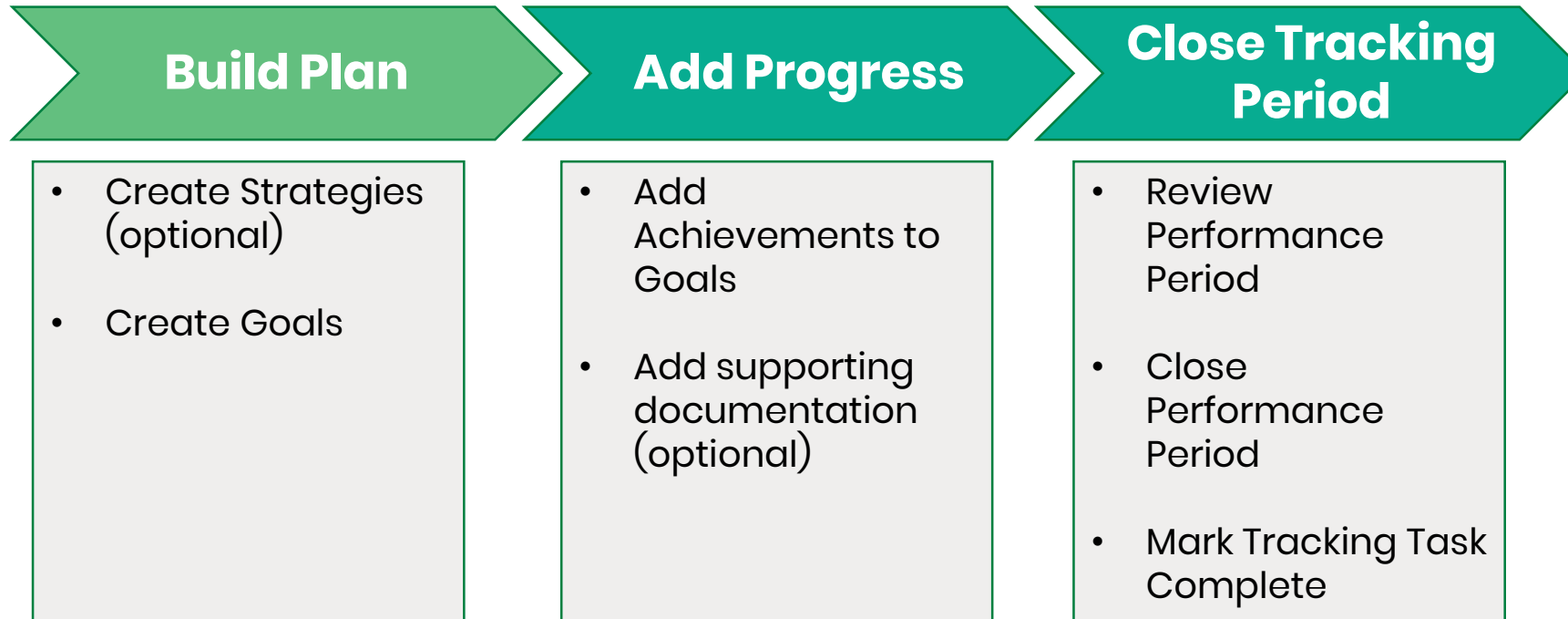
Tracking Period frequency is set on the **Grant Settings** page and may be: Monthly, Quarterly, Semi-Annually, or Annually

Performance Plan: Goals

Manage Performance Plans

PERFORMANCE PLAN

STRATEGY

GOAL

Goal Name

Goal Value

Responsible Person

*Time Allocation**

Supporting Documentation

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

Performance Plan: Goal Types

Goal Types

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

Performance Plan: Goal Types

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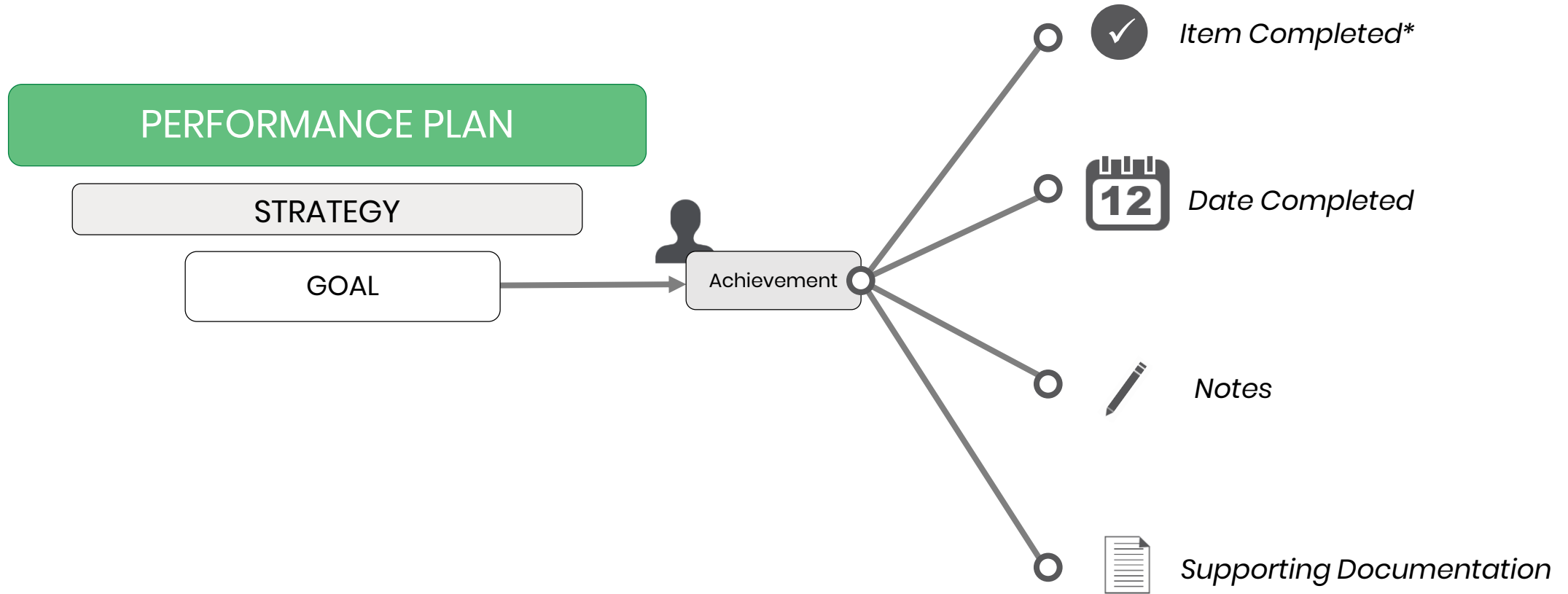
*Item completed formatting is determined by goal type: i.e. a number completed, an answer to a question, etc.

Performance Plan: Achievements

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
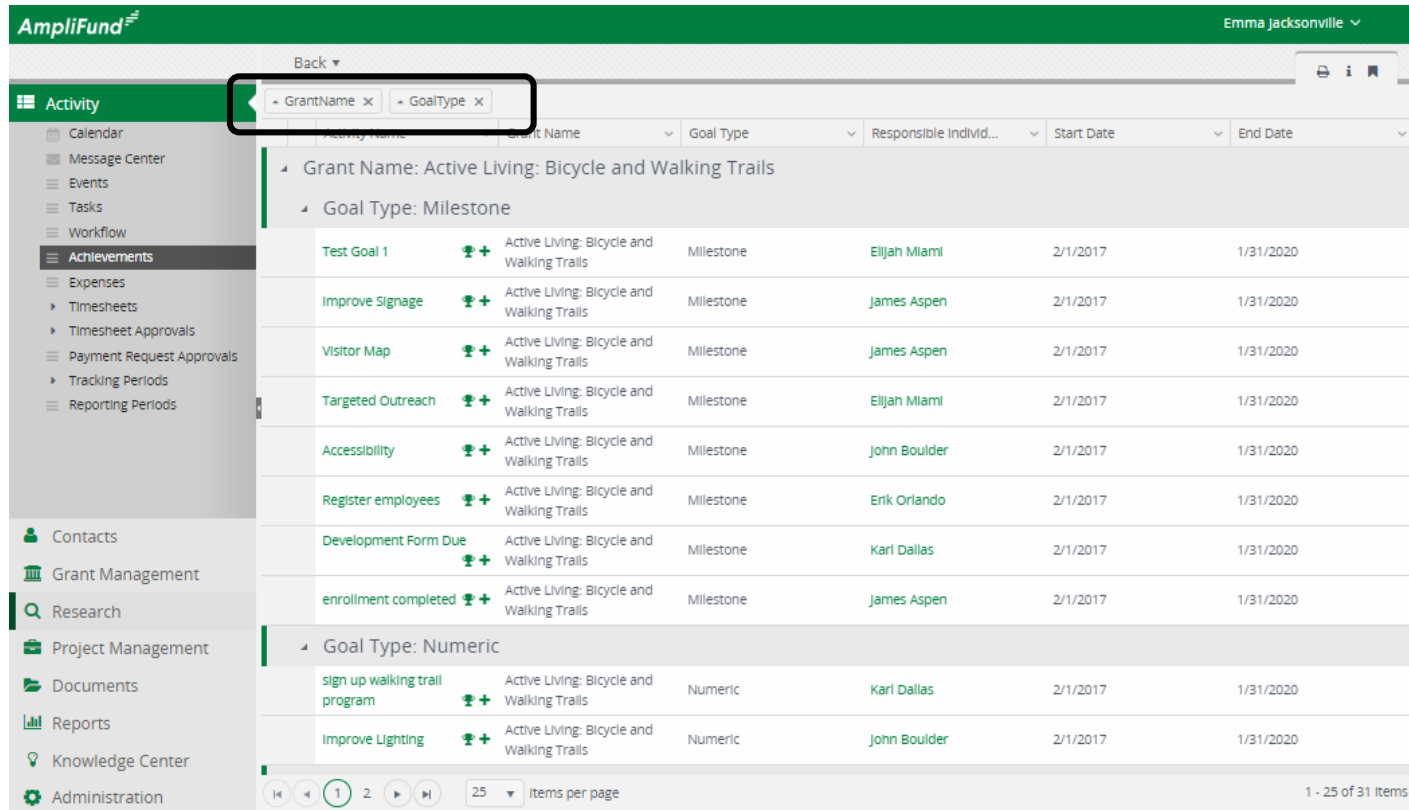
Activity → Tracking Periods

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.

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

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- 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

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Question & Answer

Post Implementation Support

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Submit a support ticket:

support@amplifund.Zendesk.com

Visit the support portal:

https://amplifund.zendesk.com
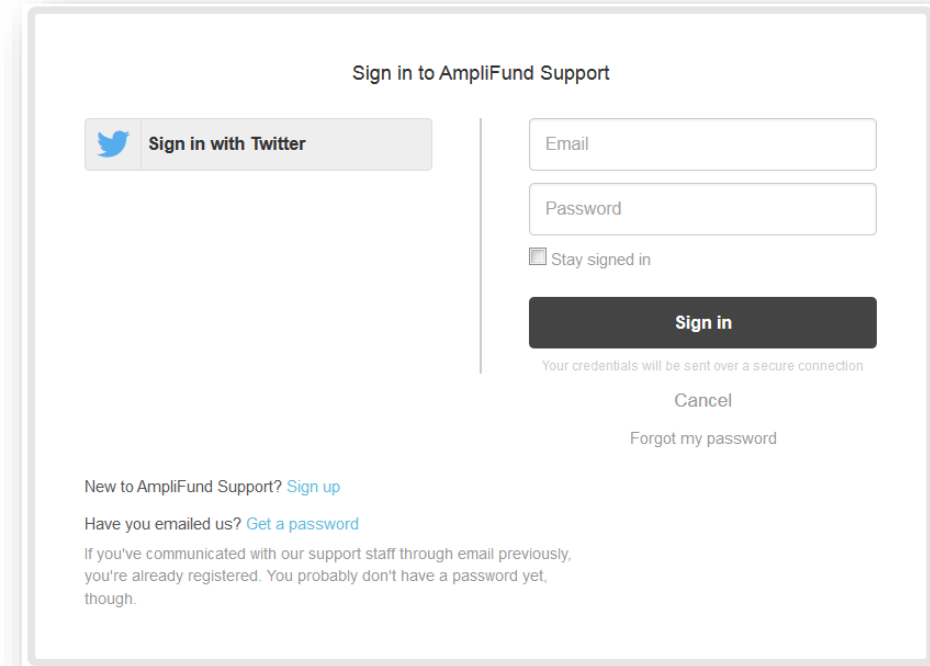
Supported Browsers:

- 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

AmpliFund Support Site

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