**How to complete a performance plan template**

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| Script  |
| Welcome to the AmpliFund applicant series video focused on completing a performance plan template  |
| If a performance plan template is required, you will find it as a section with an asterisk in the top navigation options of your application.  If the performance plan section is present but does not have an asterisk it is not required.  |
| When you click on performance plan you will be directed to the performance plan entry page.  This screen will include guidance from the funder on their expectations of what performance plan goals you will include as part of your application.  Based on funder requirements, these may be very specific or generic and you may be required to input one or multiple goals per section.  |
| Goal strategies that are required are marked with an asterisk.  If any are marked with an asterisk you will need to enter a goal to be able to mark the performance plan section as complete.  |
| To enter a goal, click on the plus sign next to Add Goal.  This will take you to an entry screen for your goal.  The first field is the goal type.  This may be a drop down or maybe hard coded to a specific goal type the funder expects.    |
| In this example we have a drop down and have a few options including Milestone, numeric, narrative, etc   |
| Based on the goal type selected, the required fields will change.  For example with a milestone goal you need to include a name, but also have an option to include a due date and description.  For a numeric goal type, name and number to be achieved are required and then again you can enter a description if you’d like.  Finally as a third example, for narrative, the name and narrative are required.  |
| Once you’ve entered your goal information, click on create at the bottom of the screen.  Your goal will then appear on the proposed performance plan.  You can edit or delete the goal you entered by using the pencil icon or trash can icon at any time.  |
| To mark your performance plan as complete, which is required to submit your application, you’ll need to add at least one goal to each required field.  |
| Once you’ve entered all required goals, click mark as complete to complete your performance plan.  To submit your application, the performance plan must be marked as complete.  Then you can hit save & continue to move onto the next section of your application.  If you need to edit any items you’ve entered , you can hit Mark as in progress and edit the section.  |
| Through this applicant series video you learned how to complete the performance plan template in the applicant portal.  Thank you for attending!  |