**Supplemental video: Application Performance Plan Template**

|  |
| --- |
| Script  |
| Welcome to the AmpliFund Training Video focused on the application performance plan template.  |
| There are a number of key steps to successfully build and launch an application.  In this video we’ll focus on configuring performance plan template.    |
| First, let’s learn a little about the performance plan template and why you might use it.  The performance plan template is an optional tool you can include in your applications within AmpliFund.  It gathers from applicants their proposed performance goals, your organization may refer to this as programmatic goals or outcomes tracking.   The performance plan template standardizes the format you receive performance goals from applicants and allows you to specify both the type of goals and number of goals you expect.  |
| There is one pre-requisite you need to take to configure the performance plan template.  You will need to select the option to require or include the performance plan template in the application configuration settings.  For a detailed review on the application settings, watch our Configuring application settings video.  Now, with that steps complete, lets jump into AmpliFund together and configure the performance plan template.  |
| From the calendar, click on Award management then Fund Opportunities.  |
| Select from the list the relevant opportunity by clicking on the name.  |
| From the opportunity details page, click on Configuration> Performance Plan Template  |
| This takes you to the performance plan template creation page where you’ll add applicable strategies and requirements for your opportunity.  Click on the plus sign in the upper right hand corner to add the first one.  |
| On the entry screen, the required fields are the strategy title, if it is required and the applicable goal types.  You can also add a description to provide the applicant with additional information or instruction about what you are expecting for the strategy goals.  You can make the strategies very general, like Goal 1 if you want the applicants to set their own goals or you can be specific and identify exactly what details you want entered in the goal.  The goal types selected would allow the applicant to chose which type.  If you want an applicant to have a numeric goal, leave only that box checked for the strategy.  If you are open to any goal types, you can leave all goal types selected.  For additional information on goal types, watch our quick tip video on available goal types.  |
| After you’ve entered all applicable information and hit save the goal strategy will appear on the performance plan template page.  Let’s add one more strategy together.  |
| Here we entered a more specific strategy with only one allowed goal type.    |
| After we hit save you can now see the two performance strategies built into the template.  You can add as many performance strategies as you’d like based on the expectations for your opportunity.    |
| Now, let’s take a look at what this might look like from an applicant’s perspective.  When an applicant clicks into the performance plan template, they will see the strategies you entered and descriptions.  They will have an option next to each strategy to enter a goal.  |
| If you’ve allowed multiple goal types per strategy, the applicant will have a drop down option like the one in red here with any applicable goal types you selected.  The required fields, marked with an asterisk will change based on the goal type selected by the applicant.  |
| If you specified a specific goal type for a particular strategy, there will not be a drop down next to the goal type.  Required fields will be defaulted based on the goal type.  |
| If a strategy is marked as required when you set up the template, applicants will be required to enter one goal, however they will be able to enter as many goals as they like.  After an applicant enters a goal, that will appear under the strategy and will include the name, description, any required information and the goal type.  |
| Through this Core Concept video, you’ve learned how to set up the performance plan template in an application.  Should you have additional questions, please visit our support site.  Thank you!  |