**Core Concept: How to create a project performance plan**

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| Script  |
| Welcome to the AmpliFund Core Concept video focused on how to create a Project performance plan.  |
| After logging into AmpliFund  |
| Click on Project Management then Projects.  |
| Select the applicable project from your list of available projects.  |
| At the top drop down select planning.  If you are going to build performance strategies, start by selecting performance strategies.  As a reminder strategies allow you the ability to group multiple like performance goals together.  |
| To add a strategy click on the plus icon in the upper right hand corner.  |
| The only required field is the strategy name, however you can also add a strategy description if you’d like.  Once you’ve entered relevant information click on the create button.  |
| After you create your strategy it will appear on the page, you can use the pencil icon to edit or the trash can to delete if necessary.  Now let’s enter some performance goals that align to our strategy.  |
| Go to Planning at the top then Performance Goals.  |
| To add a performance goal, click the plus icon in the upper right hand corner.  |
| From this screen you can select a strategy to link the goal to.  Select the goal type from the list.  For a comprehensive review of our available goal types you can watch our performance goals video available on the support site.  Enter a name for your goal and responsible individual.  Based on the goal type you may be required to add additional fields.  You also have the option to add a description.  Here I’ve added a milestone goal type linked to the strategy we created earlier.  |
| After clicking create, my performance goal appears on the screen.  If necessary you can edit using the pencil, copy using the copy icon or delete using the trash can icon.  |
| Now if I’d like I can link my performance goal to my applicable grant performance plan.  |
| To create that link I can go back to my project details page and click on the applicable grant from the project information section.  |
| That will take me to the grant details page.  There I can click on Post Award then Performance then Performance Plan.  |
| In this grant I haven’t yet created my performance plan, so I’ll start by creating a performance goal that I can link to my project by clicking the plus sign in the upper right hand corner.  |
| This will bring up my performance plan entry screen.  I can enter my goal information as necessary and there is an option at the bottom to link to a project goal.  This will be a drop down of all project goals you’ve created so far.  |
| Select the applicable project goal, enter other goal information and click create.  |
| Now with my performance plan goals linked when I enter an achievement on my grant performance plan you can also see the linked project.  Let’s enter an achievement to demonstrate by clicking on the achievement icon from this screen.  |
| Then click on the plus icon to add your first achievement.  |
| On the achievement entry screen you can see the linked project.  Add your achievement details and click create.  |
| Through this Core Concept video, you’ve learned how to create a project performance plan.  Should you have additional questions, please reference our support site.  Thank you!  |