**Core Concept: Performance Plans**

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| Welcome to the AmpliFund Core Concept video focused on Performance Plans.  While AmpliFund uses the term performance plans, your organization may refer to this as Program Reporting, Programmatic Goals, Funder Reports or Outcome tracking.  |
| Before you enter a performance plan there are a couple of key pieces of information you need to make sure are entered in AmpliFund.  First, a performance plan is created against a specific grant, so ensure you’ve already entered your grant into AmpliFund before you get started.  Also, you would need any staff or users that would be responsible for any of the performance plan goals in AmplIFund prior to building your plan.  Remember only users can log into AmpliFund, staff can be assigned responsibility and receive emails but do not have access to interact with items in AmpliFund.  |
| The performance plan functionality within AmpliFund allows you to build your plan for each grant to achieve goals.  You can group goals by strategies and then enter goals.  As you start making progress against your goals the responsible individuals can enter achievements against the performance plan goals and any necessary documentation.  Finally, you can set up tracking periods for when reporting is due to your funder.  At the end of each performance plan tracking period you can close out the period and mark goals as complete.  |
| During this Core Concept video we’ll be focused on building your plan.  In future Core Concept videos we’ll dive into how to enter achievements and create/close your tracking periods.  |
| When entering a performance plan, there are some key details you enter into the goal including a goal name, value, the responsible person, allocation (if applicable) and documentation.  You can group performance goals into strategies if you’d like.    |
| Let’s say you received a grant to Improve the Parks and Recreation offerings in your city.  A strategy could be focused around evaluating offerings in other nearby cities, then a goal against that strategy could be meeting with Parks and Recs Department managers of 3 nearby cities, another goal could be attending 4 events in other cities.  Then another strategy could be obtaining resident feedback.  Under that strategy you could have a goal of conducting a survey, then a second goal of assessing feedback from attendance at events. The strategy allows you to group these similar goals together for filtering and reporting later in the AmpliFund system.  Strategies are not required but you may find them useful.  |
| The goal type is one of the required fields when entering a performance plan goal.  Next we’ll go through the available goal types.  |
| The first goal type is milestone.  In this goal you’d need to enter the name, due date and responsible individual.  A milestone goal is best used to document a specific action or point in time such as holding a meeting, completing a survey, conducting a review or submitting content.   |
| Next is a narrative goal type.  You’ll need to enter the name, question and responsible individual.  A narrative goal type can be used to gather a detailed summary, overall results or a summary of a specific topic, such as how successful was the initiative.  |
| Our next goal type to review is numeric.  Required fields include the name, number to be achieved and the responsible individual.  The numeric goal type is best used to tracking achieving a specific number like participants or reaching a number of people.   |
| The next goal type is percent achieved.  For this type, the required fields are the name, desired % and responsible individual.  This goal type is used to track items like percentage of participants or members, or retention rate.   |
| The next goal type is percent changed.  Required fields include the name, desired %, current % and responsible individual.  The percent changed goal can be used to show increases or decreases in rate, such as an increase in participation rate or a decrease in accident rate.  |
| Our last goal type to review is the reimbursement goal type.  Required fields for this goal are the name, rate per achievement, the number to be achieved and the responsible individual. This can be used for goals like receiving funds for a number of participants or number of completed items.    |
| Now that we know a bit about performance plans, let’s dive into AmpliFund and enter a performance plan for our grant.  After we log in and land on the calendar, navigate to your grants page.  |
| Select the grant that you are ready to enter a performance plan for.  Performance plans can be built for both the pre and post award stage.  If you build a performance plan for a grant in the pre-award stage and then are awarded the grant, you can copy the performance plan over when you change the status to approved.  Today we’ll be entering a performance plan for an approved grant to show you the post award performance plan entry process.  To get there from my grant, I’ll click on Post Award > Performance >Performance Plan  |
| As you can see from this drop down, Under Performance is also the option for Performance Strategies.  Strategies are optional, but if you plan to use them you can enter those here, the only required field is the name, you also have the option to enter a description.  |
| Let’s move to entering our performance plan.  Once I click on performance plan the screen is empty as I don’t have any goals entered yet.  I’ll click on the plus sign in the top right icon toolbar to add a goal.  |
| First I’ll add a milestone goal.  In this goal I have a meeting that needs to be held.  The only required fields here are the name, the type, the responsible individual and the due date.  The responsible individual pulls from your staff records.  The Responsible Individual can add achievements to the goal and if subscribed to digest emails will receive reminders. I also have the option to add a description and on the attachments tab, I can add a file if there’s anything relevant to include with this goal.  Then I’ll click create and my goal will be added to the performance plan.  |
| Next let’s add a numeric goal type.  I’ll click on the plus sign again in the top right to add my next goal.  |
| In the entry screen, I’ll change the goal type to numeric.  Now I’ll enter my goal name and my responsible individual.  Now you’ll notice a new field, I need to enter my numeric value for what I’m achieving.  This time I don’t have a due date, the due date for this goal would be the end of your grant period.    |
| If I want to allocate my goal across either the years of the grant or by month.  I’d click on the allocations tab, then I can click on the arrows to evenly spread the goal across either years or months.  Then I’ll hit save, then create my goal.  |
| On the Performance Plan details page, I can click on the pencil icon to edit any goals, and also have the option to copy or delete goals.  From this screen I can add achievements, which we’ll cover in a future Core Concept video.  |
| Congratulations!  You’ve entered a performance plan into AmpliFund!  Should you have any additional questions about performance plans, please visit our support site.  Thank you!  |