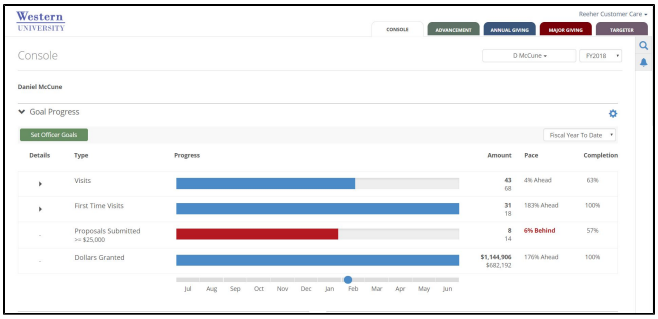
Goal Progress

The **Goal Progress** viewport provides insight into the Officer's progress against a goal to help you manage Officer performance. It displays the type of goal, the progress made to-date, the pace of goal progress and percentage of completion against the goal. The viewport is capable of showing progress of a single officer or multiple officers based on what is selected in the Officer Selection drop-down menu at the top right of the page. The **time period drop-down** at the top right of the viewport allows you to view the progress either through the full year to date or through the selected month. This allows officer and officer managers to better review progress at a set time period. Use the **Gear** or 'options' icon to export or view iHelp for the viewport.



Available Goals

- **Contacts** - Choose the number and type of contact reports that count toward the goal.
- **Visits** - The number of contact reports submitted in the selected year with a type mapped in Fundraiser Performance Management to "Visit".
- **First Time Visits** - The number of entities with a "visit" contact report entered against them, who have never previously had a visit entered by anyone at your institution.
- **Proposals Submitted** - Number of proposals submitted with an Ask Date in the current year and an Ask Amount in the selected range (Ex: 20 submitted proposals $25,000).
- **Proposals Granted** - Number of proposals granted with a Granted Date in the current year and a Granted Amount in the selected range (Ex: 10 granted proposals $50,000).
- **Proposal Dollars Submitted** - The total dollar amount of proposals submitted in the current year. Qualifying proposals have an Ask Date this year. Then the Ask Amount is used to determine the total toward the goal.
- **Proposal Dollars Granted** - The total dollar amount of proposals granted in the current year. Qualifying proposals have a Granted Date this year. Then the Granted Amount is used to determine the total toward the goal. It does not matter what year the proposal was submitted.

Key Definitions:

- **Type** - This is the type of goal that is being measured. See above to see our list of available goals.
- **Progress** - This is the progress based on the contact reports or proposals that have been entered versus the goal. Changing the time period on the viewport updates the progress based on the selected time period. Click the progress bar to see the Contacts or Proposals that are counted toward the goal.
- **Amount** - Shows the amount of progress the officer(s) has made (Visits made, proposals submitted, etc.) vs. the total of the goal.
- **Pace** - Fundraiser Performance Management takes the total goal and averages it out monthly. The Pace looks at the % ahead or behind this monthly average the progress against the goal is.
- **Completion** - The percentage of progress against the total goal.

Use the **Gear** or 'options' icon to export, resize, or view iHelp for the

viewport**. The Grabber Icon** allows you to drag and drop the viewport to another area on the page