# Setting Goals

There are two portions to the **Set Goals** area. First is the ability to set goals for your officers, whether based off of Peer Groups or for the individual officers. Second is a Peer Group editing feature which allows you to create, edit, and delete peer groups and assign officers appropriately.

***Related Videos***

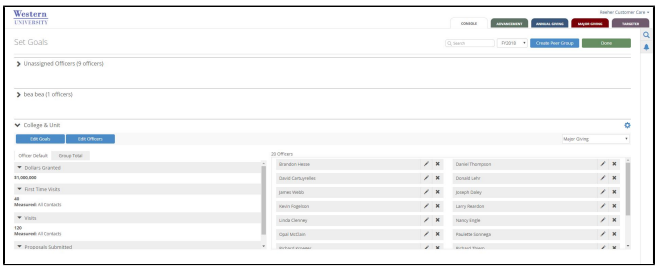
- Introduction to Officer Goals Management
- Creating & Editing Officer Goals

**More Videos**

To help you get started, Fundraiser Performance Management has populated recommended goals to provide guidance for your initial setup. Our recommended goals come from FPM Community Network Benchmark data and are set based on performance levels of the top 25% of gift officers. These annual goals are:

**Reeher Recommended Goals:**

- Visits = 120
- First Time Visits = 40
- Proposals Submitted at $25,000 or more = 20
- Dollars Granted  $1,000,000




Since every group of Officers is different, be sure to review and modify these goals for your specific Peer Group. Once you are done setting up the default goals for this Peer Group, you can then modify goals for specific Officers within the Peer Group.

**Navigation**

- **Search** – Search for a Gift Officer's name to determine what Peer Group they are assigned to and view their goals.
- **Fiscal Year** – Select the year for your goals.
- **Arrow** - Use the arrow to the left of the Peer Group name to expand or collapse that group.
- **Gear** - The gear icon shows your options for the peer group including Edit Peer Group, Edit Goals, Edit Officers, or Delete Peer Group.

**Setting Goals**

**Choosing Fiscal Year vs. Calendar Year**
**Note:** If this is your first time setting goals for your gift officers, be sure to go to the **Control Panel > Manage Platform > Calendar Year** and select to set goals by either fiscal year or calendar year.

To begin setting the yearly goals for your officers

1. Click on **Set Officer Goals**
2. Default goals will appear populated with the recommended defaults
3. You may modify or delete the goals, if appropriate, for your institution
4. To add an additional goal, click on any goal on the left and it will be added
5. You will be prompted to add the information necessary to define the goal
6. More than one goal per Goal Metric can be entered, meaning you can add multiple proposals at different levels (20 Proposals submitted between $25K-$50K, 10 Proposals submitted > $50K
7. Remove any goals you do not wish to use by clicking on the

**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 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 towards 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 towards the goal. It does not matter what year the proposal was submitted.

X related to the goal name

8. **Group Total** provides the aggregated total for all Officers in the Peer Group, including unique goals for specific Officers that have been established

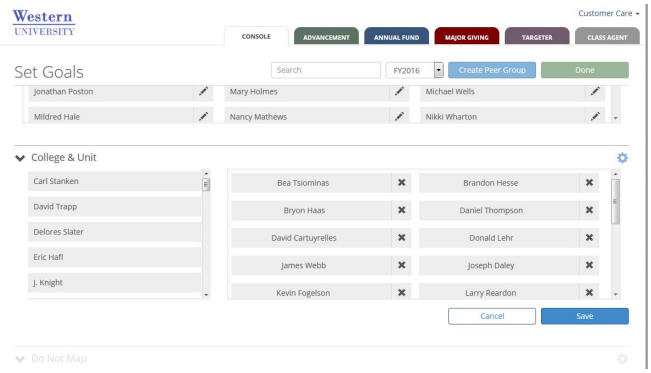
**Create / Edit Individual Gift Officer Goals within a Peer Group**

Each Officer, within a Peer Group, may be assigned goals that are unique to them. As an example: You may wish to assign a new officer within the Peer Group a lower proposals submitted goal during their first year.

1. Click on the **Edit** pencil next to the officer's name. This opens the list of goals available for configuration.
2. Edit the goals to the unique situation of the officer selected using the same steps as above.
3. Save
4. An Icon will appear next to the Gift Officer's name indicating it has unique goals.

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## Editing Peer Groups




To effectively organize your Officers, your executives and system administrator have grouped together your staff with portfolios into Peer Groups. These peer groups are typically officers at an institution with similar roles or portfolio make up. Peer Groups are used in the tool in the Major Giving layer and in quarterly and yearly reports that Fundraiser Performance Management provides to your executive team. If you are unfamiliar with your Peer Groups or wish to make changes to the groups, please consult your Fundraiser Performance Management System Administrator.

**Creating a Peer Group**

1. Click on the Create Peer Group button in the upper right of the screen
2. Enter the Peer Group name
3. Select Gift Officer Type
4. Set Peer Group to Active
5. Save
6. The new Peer Group will appear at the bottom of the screen

**Selecting and Editing Officers in a Peer Group**

1. Click on Add Officers
2. A list of unassigned Officers appears on the left
3. Click on the Officer's name and it will be added to the peer group
4. Click on Save
5. Add additional Officers by clicking on the name in the list on the left
6. To remove an Officer, click on the X next to the name on the right
7. Save

**Peer Group Gift Officer Type**

Fundraiser Performance Management uses the Peer Groups as part of the research and bench marking. To help us with this research, we are asking you to set the Gift Officer Type for each peer group. The selection drop-down is located at the right of each peer group.

Please choose the type that best matches with the type of gift officer assigned to that group. Any Peer Group with a missing type will be highlighted in Red.