

Goals Over Time

The **Goals Over Time** viewport displays how much progress the selected Officer(s) have made over the FY or CY, and the average amount per month they would need to reach their goal for the FY or CY. The viewport is capable of showing progress of a single Officer or a group of Officers depending on the Officer Selection drop-down at the top of the page. Each goal is displayed based on the drop down selection of the goal type. Click on the marker for each month to drill down into the progress on that goal.

Use the **Gear** or 'options' icon to export, resize, or view iHelp for the viewport. **The Grabber Icon** allows you drag and drop the viewport to another area on the page

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.

