

Goals by Officer

The **Goals by Officer** viewport shows a breakdown of each Officer's goals and where they currently stand in achieving them. Columns will include the progress toward each goal, what the goal is, and the pace toward the goal (% based on the monthly average). This is a breakdown of the data presented in the Goal Progress viewport by individual Officers rather than the entire group. Any officer selected in the **Officer Selection** drop-down menu at the top of the page will be included in this viewport.



Use the arrows at the top to page through the available gift officers. The **Search** bar will allow you to find a specific officer from those selected. 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 towards 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.

Goals by Officer

Search



Set Officer Goals

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Officer(s)	Current Dollars Granted	Goal Dollars Granted	Dollars Granted Pace
Bea Tsiominas	\$0	\$600,000	29% behind
Brandon Hesse	\$50,000	\$1,000,000	24% behind
Bryon Haas	\$825,000	\$1,000,000	53% ahead
Daniel Thompson	\$0	\$500,000	29% behind
David Cartuyrelles	\$100,000	\$50,000	171% ahead

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