

# Portfolio Proposal Coverage vs Peer Group

The **Portfolio Proposal Coverage vs Peer Group** viewport breaks down the selected officer's portfolio by whether their prospects have an active proposal. It then compares that officer's total against the average breakdown of that officer's peer group.

Each prospect in a portfolio is assigned to one of three categories:

- **Has Active Proposal:** the prospect has a proposal that is currently open (meaning In Development or Submitted/Pending statuses)
- **Has Had Active Proposals:** the prospect does not currently have an open proposal, but has a proposal in the past that was either granted or declined
- **Has Never Had A Proposal:** the prospect is associated with no proposal

The **Assignment** dropdown is defaulted to Primary, but can be changed to Non-Primary or All to change which of the officer's prospects are displayed.

You also can toggle between the **Number** of prospects in each category or the total dollar **Percent** of prospects in that status.

Clicking on any of the links in the table will bring up the list of proposals that make up the results.

## Key Definitions Related to this Viewport:

- **Prospect:** an entity (or collection of entities) assigned to a gift officer. Prospects are given an assignment type, which are either mapped to Primary or Non-Primary by your institutions administrator
- **Pending:** Proposals that have been asked and are awaiting a response. They have an "Submitted/Pending" status.
- **Declined:** Proposals that have been declined. They have a "Declined" status.
- **Granted:** Proposals that have been granted. They have an "Approved" status.
- **Peer Group:** A set of gift officers that have similar roles and should be evaluated as peers. Peer Groups are configured by your institution's system administrator in Fundraiser Performance Management.