INL DevResults User Guide:

Add Targets to Indicators
(INL Users)

Overview

This user guide provides instructions for INL Staff on setting targets in DevResults. In general, note the following about the target-setting process:

➢ Targets are intended to gauge whether a project's progress is generally on track.

➢ Falling "behind" on an end-of-project target does not mean the project is failing to meet its requirements; it means INL and the implementing partner should discuss whether there needs to be a change in the implementation plan or a change in the target.

➢ Targets are not final. INL and Partners may review targets at any time and can agree to make necessary adjustments, such as when there are indications that a target may need to be reconsidered.

INL Program Managers may enter targets themselves or ask Partners to enter targets in DevResults. Regardless of who enters the targets:

➢ INL Program Managers should work with Partners to develop targets.

➢ All INL Program Managers should review slides 3-10 (beginning here) explaining how targets are used in DevResults to better understand how to interpret the comparison of actual results to targets.

➢ All INL Staff who will be entering targets in DevResults should review slides 3-29 (beginning here) to ensure targets are entered accurately and updated correctly, using the step-by-step instructions provided.

Understanding and Interpreting Targets in DevResults

What Is a Target in DevResults?

A target is a specific, planned level of a result to be achieved for each indicator by a specific date. In DevResults, targets must be set for each indicator, and each target has two components: the value of the expected result ("Project Target") and the date that target is expected to be reached ("Date").

As data are reported for the indicator, DevResults populates the results field ("Actual"), and calculates progress toward the target ("Actual % of Target").

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| Definition | **Targets** | Data | Reports | Forms | Documents |

Show results for Demo - K9 Units - DEMO Project: K9 Units

Targets

Targets are entered incrementally.

Date	Project Target	Actual	Actual % of Target
31 Dec 2022	500	250	50%
Click to add...			

Success Ranges

Progress Interpretation Higher is better

Good 100 % or higher

As data are entered for each reporting period...

DevResults will track progress towards targets.

DevResults

✔ Done

Options for Tracking Performance Towards Targets

Defining targets and dates establishes how:

- DevResults will calculate progress towards targets on a quarterly basis
- Progress towards targets will be displayed on the paper Performance Report

Progress towards targets in DevResults can be tracked in two ways, depending on what works best for the performance monitoring needs of the specific project:

1. **Cumulative Project Total:** To monitor progress each quarter towards an end-of-project target (recommended)

    - Indicator results will accumulate each quarter, and be compared to the target expected to be achieved <u>at the end of the project's period of performance</u>.

2. **Incremental:** To monitor progress each quarter towards specific quarterly targets

    - Each quarter's indicator results will be compared to the target expected to be achieved <u>each quarter</u>.

See the next slides for a discussion of each option, and how to prepare indicators for each target-setting type prior to entering targets.

Option 1: Project Total (slide 1 of 2)

The simplest, and recommended, method for tracking performance is to monitor progress toward an **end-of-project target**; in other words, the goal the project intends to reach by the end of the period of performance.

This is done by setting the indicator's target type to "cumulative" (see next slide) and entering the same project-level target for each reporting period:

Home ▸ Program Info ▸ Data Definitions ▸ Indicators ▸ **DEMO**

KM.DDL.00.00 DEMO

| Definition | **Targets** | Data | Reports | Forms | Documents |

Targets

Targets are entered cumulatively.

Date	Project Target	Actual	Actual % of Target
31 Mar 2022	500	125	25%
30 Jun 2022	500	245	49%
30 Sep 2022	500	356	71%
31 Dec 2022	500	481	96%
Click to add...			

Targets reflect the goal of reaching a given total (500 in this example) by the end of the project

DvR sums data for each reporting period; the final reporting period reflects the project's total achievement

Option 1: Project Total (slide 2 of 2)

To track towards an end-of-project target, set the indicator to track progress towards targets **cumulatively.**

Open the indicator's Definition" tab, find the "Targets are entered" field in the Characteristics section, and select "Cumulatively."

(NOTE: this field corresponds to Column O in the indicator bulk upload template.)

Option 2: Incremental (slide 1 of 2)

In some cases, the project may have specific, known targets for each of the indicator's reporting periods: each target value is equivalent to the expected result for that quarter <u>only</u>. These are called **incremental** targets.

Monitoring progress toward an incremental target is done by setting the indicator's target type to "incremental" (see next slide). See below for two examples of how DevResults tracks progress towards this type of target.

Targets reflect different goals **each quarter** (which sum to 500 by project close)

Targets reflect the goal of reaching 65% **each quarter**

Option 2: Incremental (slide 2 of 2)

To track towards an incremental target, set the indicator to track progress towards targets **incrementally.**

Open the indicator's Definition" tab, find the "Targets are entered" field in the Characteristics section, and select "Incrementally."

(NOTE: this field corresponds to Column O in the indicator bulk upload template.)

Summary

➢ Once the indicator is set up to track performance towards targets of either of the two options (project total, or incremental), proceed to entering the targets themselves, as discussed in the next section of this guide.

Summary: Two Options for Tracking Performance Towards Targets		
	Option 1: Project Total	**Option 2: Incremental**
Condition of Use:	For tracking progress towards an end-of-project target over the course of a project's entire period of performance	For tracking progress each quarter towards specific quarterly targets
Targets Configuration:	Set Targets in DevResults As: "Cumulatively" (see steps here)	Set Targets in DevResults As: "Incremental" (see steps here)
Example for Entering Targets:	When entering targets for each reporting period, provide the whole end-of-project target value as each reporting period's target (e.g. if the goal is to enroll 200 total trainees in a course over the life of a project, then enter the target every quarter as 200).	Enter the specific target for each reporting period (e.g., if the goal is to enroll 20 trainees in a course one quarter, and 10 in the next, the target for each quarter will be 20 and 10 respectively)

Add Targets to Indicators

Add Targets to Indicators— Three Options

INL staff can add project total or incremental targets to indicators in multiple ways. Users should choose the way that makes the most sense according to their needs.

This guide walks users through steps for all three options:

A. **Add a Single Target** — This option is best for entering or updating a few targets for one indicator, with a computer that runs DevResults relatively quickly. Click here to navigate directly to steps for this option.

B. **Add Multiple Targets for a Single Indicator** — This option is best for entering targets for multiple reporting periods for one indicator, with a computer that does not run DevResults quickly. Click here to navigate directly to steps for this option.

C. **Add Multiple Targets for Multiple Indicators** — This option is best for entering targets for multiple indicators. It is the recommended option for setting up targets for an entire project. Click here to navigate directly to steps for this option.

A.1 Option A: Add a Single Target to an Indicator

To begin, navigate to the left top of the homepage and hover over the **Program Info** tab to select **Projects.**

A.2 Find a Project

Next, find the project for which targets will be entered, reviewed, or edited.

Search for the project by name in the search bar, or use the filter menu on the left side of the screen to filter projects by Office/Section and select the relevant project. Click on the project name to open the project's Overview tab.

Type all or part of the project name in the search bar to filter the list.

To see only projects for a particular Office/Section, select it here to filter the project list.

A.3 Open Indicator in New Tab

The indicators mapped to the project are listed under **Results and Indicators**, in the **Classification** section.

<u>Right click</u> on the name of the indicator(s) requiring an edit, and select "**Open link in new tab.**"

(NOTE: Opening the indicator in a new tab allows updates to be made without having to navigate back to the project page each time. This is especially helpful when entering targets for multiple indicators. For substantial updates, use the bulk upload option described <u>here</u>.)

Right click the indicator name to open the indicator in a new tab

A.4 Adjust "Targets are entered" Option

On the indicator's "Definition" tab, check whether the desired "Targets are entered" option is selected, and update as needed.

For additional guidance on choosing whether to track "Cumulatively" or "Incrementally," review slides 5-10 here.

REMINDER:

➤ Choose **Cumulatively** to track towards a project total (end-of-project) target

➤ Choose **Incrementally** to track towards a specific target per reporting period

A.5 Navigate to the Targets Tab

Next, click the **Targets** tab, as shown below.

A.6 Select "Show Results for [the project]"

The **Targets** tab displays any targets entered, including both "Global" and "Project" targets. However, **all projects must enter targets at the project level** (i.e., "Project Targets") - no projects will enter global targets.

To enter project-level targets, navigate to the drop-down menu in the top right corner that reads "Show results for (All projects)". Click on the menu to select the project name from the drop-down list:

⚠️ **WARNING:**

Setting Project targets is necessary for the Performance Report to display correctly. Setting Global targets instead of Project targets will cause the "(Cumulative) Target" and "% (Cumulative) Target Complete" fields in the Performance Report to display as "No response provided" and "Result and/or Target missing," respectively.

A.7 Select "Show Results for [the project]" (continued)

Selecting the project name from the drop-down menu refreshes the page with a project-specific view.

NOTE: Be sure to select the correct project!

A.8 Fill in Date and Project Target

To enter target(s), fill in two fields: **Date** and **Project Target**. <u>These are the only editable fields on this page.</u> (The other fields will calculate automatically based on submitted data and the targets set here.)

Click into a new line to add information; DevResults will autosave progress.

Enter targets for *every* reporting period within the period of performance (or, through the end of the period of performance, if the project Start Date falls prior to enrollment in DevResults).

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Definition | **Targets** | Data | Reports | Forms | Documents

☑ Show results for Demo - K9 Units - DEMO Project: K9 Units

Targets

Targets are entered incrementally.

Date	Project Target		Actual		Actual % of T
Click to add...					

Success Ranges

Progress Interpretation | Higher is better ☑

Good [   ] or higher

an 100

Enter a DATE that corresponds to the last date of a reporting period. For example, if the indicator reports on a quarterly basis, enter the final date of each quarterly reporting period here.

Enter the TARGET here.

⚠ **WARNING:**

Setting a target for the end of *each* reporting period in the Period of Performance is necessary for the Performance Report to display correctly. If dates that data are reported do not correspond one-to-one with dates for which targets are set, the Performance Report's Results and Targets fields will display with errors.

💡 **TIP:**

If a target date falls within a reporting period, set the date in DevResults to the end of the reporting period.

DevResults

✔ Done

B.1 Option B: Add Multiple Targets for One Indicator

It is also possible to upload targets for multiple reporting periods at once, for a single indicator, by using a bulk upload template.

On the indicator's **Targets** tab, click the gear icon in the upper right corner, and select "Download Blank Template." The Excel template will save to the computer's Downloads folder.

NOTE: For steps on how to navigate to an indicator's **Targets** tab, see slides 13-19 (beginning <u>here</u>).

B.2 Fill in the Template

Open the blank template from the Downloads folder, and fill in a date for each of the indicator's reporting periods, and the target value:

	A	B	C	D
1	**Date** ▼	**Target** ▼		
2	31 Mar 2023	600		
3	30 Jun 2023	600		
4	30 Sep 2023	600		
5	31 Dec 2023	600		
6	31 Mar 2024	600		
7	30 Jun 2024	600		
8	30 Sep 2024	600		
9	31 Dec 2024	600		
10				

Add a date corresponding to the end of **each** of the project's reporting periods

Each row contains two pieces of information:

1. The last day of the reporting period in which the target is to be achieved (date)

2. The target value itself

⚠ WARNING:

Setting a target for the end of **each** reporting period in the Period of Performance is necessary for the Performance Report to display correctly. If dates that data are reported do not correspond one-to-one with dates for which targets are set, the Performance Report's Results and Targets fields will display with errors.

💡 TIP:

If a target date falls within a reporting period, set the date in DevResults to the end of the reporting period.

B.3 Upload the Template

From the indicator's **Targets** tab, upload the template using the "Import" button on the gear menu.

C.1 Option C: Add Targets for Multiple Indicators

DevResults also provides the option to upload targets for multiple indicators—for a single project or for multiple projects—for multiple reporting periods at once.

Navigate to **Bulk Imports** under the **Tools** menu, scroll down to the "Indicator Targets" template (fifth from the bottom), and click the "Download Blank Template" button:
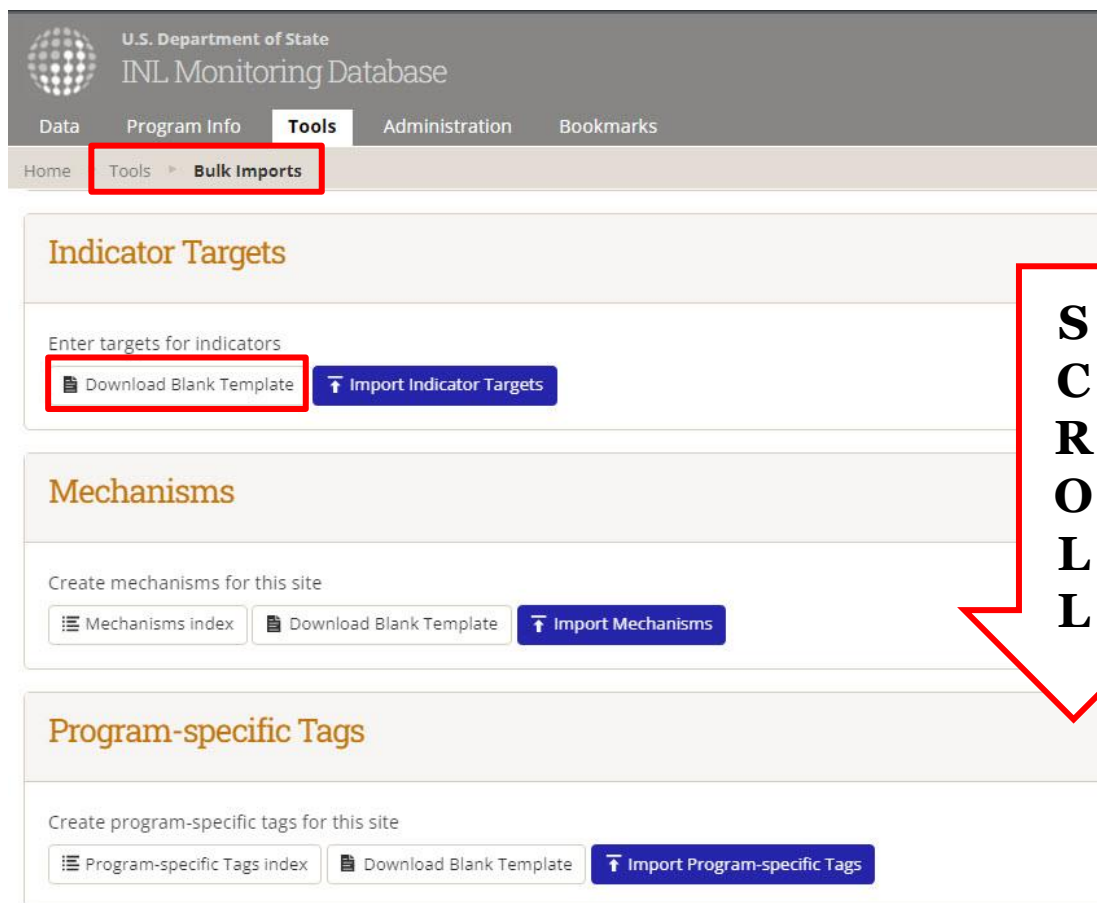
C.2 Open and Fill In the Template

Open the blank Excel template: it has fields for the indicator, project, date (e.g., reporting period end date), and target value.

Fill in one line per target (reporting period), selecting the Indicator and the Project from the drop-down menu options. See the next slide for additional tips on using the template.

	A	B	C	D	E
1	Indicator	Project	Date	Target	
2	KM.DDL.02.01 DEMO % of canines in K9 unit with current c	DEMO Project: K9 Units	31 Mar 2023	80%	
3	KM.DDL.02.01 DEMO % of canines in K9 unit with current c	DEMO Project: K9 Units	30 Jun 2023	80%	
4	KM.DDL.02.01 DEMO % of canines in K9 unit with current c	DEMO Project: K9 Units	30 Sep 2023	80%	
5	KM.DDL.02.01 DEMO % of canines in K9 unit with current c	DEMO Project: K9 Units	31 Dec 2023	80%	
6	KM.DDL.02.13 DEMO # of handlers certified by the partne	DEMO Project: K9 Units	31 Mar 2023	600	
7	KM.DDL.02.13 DEMO # of handlers certified by the partne	DEMO Project: K9 Units	30 Jun 2023	600	
8	KM.DDL.02.13 DEMO # of handlers certified by the partne	DEMO Project: K9 Units	30 Sep 2023	600	
9	KM.DDL.02.13 DEMO # of handlers certified by the partne	DEMO Project: K9 Units	31 Dec 2023	600	
10	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	31 Mar 2023	5	
11	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	30 Jun 2023	5	
12	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	30 Sep 2023	5	
13	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	31 Dec 2023	5	
14	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	31 Mar 2024	5	
15	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	30 Jun 2024	5	
16	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	30 Sep 2024	5	
17	KM.DDL.03.02 DEMO Basic - # of classification instruments	DEMO Project: Prisoner	31 Dec 2024	5	
18					

Multiple indicators

Multiple projects

Multiple dates, and the same date for different indicators/projects

⚠ **WARNING:**

Setting a target for the end of *each* reporting period in the Period of Performance is necessary for the Performance Report to display correctly. If dates that data are reported do not correspond one-to-one with dates for which targets are set, the Performance Report's Results and Targets fields will display with errors.

💡 **TIP:**

If a target date falls within a reporting period, set the date in DevResults to the end of the reporting period.
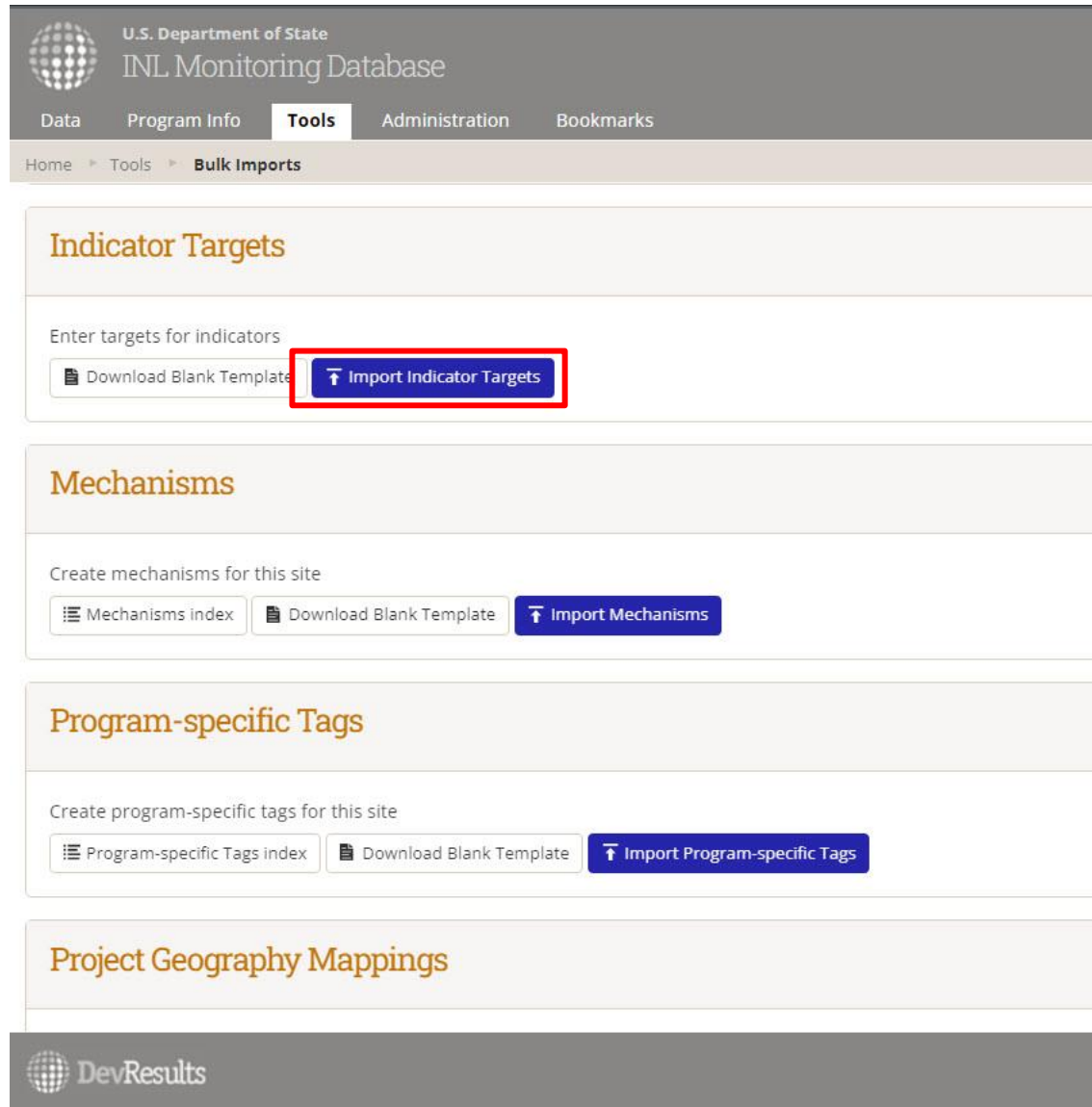
C.3 Template Tips

- **Widen columns.** When the blank template is first opened, the Indicator and Project columns will be narrow, making options difficult to view and select from the drop-down menus in these columns' cells (see right). Widen each respective column to view drop-down menu options more clearly.

Click and drag to widen columns

- **Select projects/indicators once, then copy.** After selecting projects/indicators for one row, copy and paste the cells for that chosen project and indicator into additional rows to add additional indicator targets for multiple reporting periods more easily.

- **If setting targets for many indicators across a project: copy.** Choose the project from the drop-down menu in Column B, then add the reporting period end date to the Date column. Copy and paste the project and reporting periods to new rows to add targets for multiple indicators on the same project; then select the appropriate indicator from the drop-down menu in Column A for each row, and enter the relevant target for each indicator and date.

- **Consider entering targets after setting up the template.** To enter targets for multiple indicators, projects, and/or reporting periods, consider first filling out the Indicator, Project, and Date (reporting periods) columns, and then enter targets in each row.
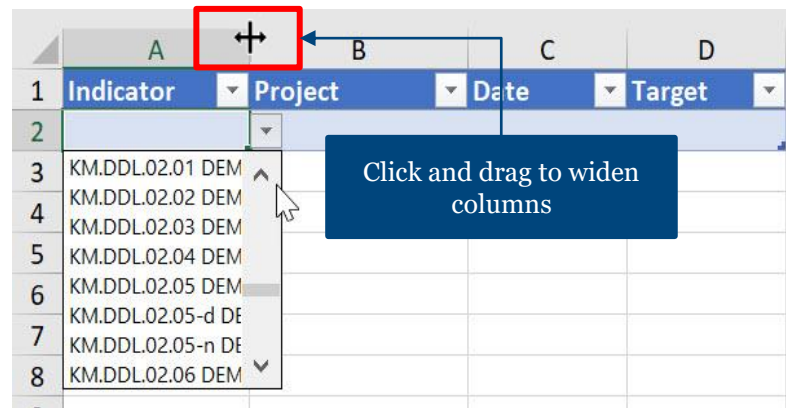
C.4 Upload the Completed Template

Once the template is populated, save and then upload via the Bulk Imports page, using the "Import Indicator Targets" button:
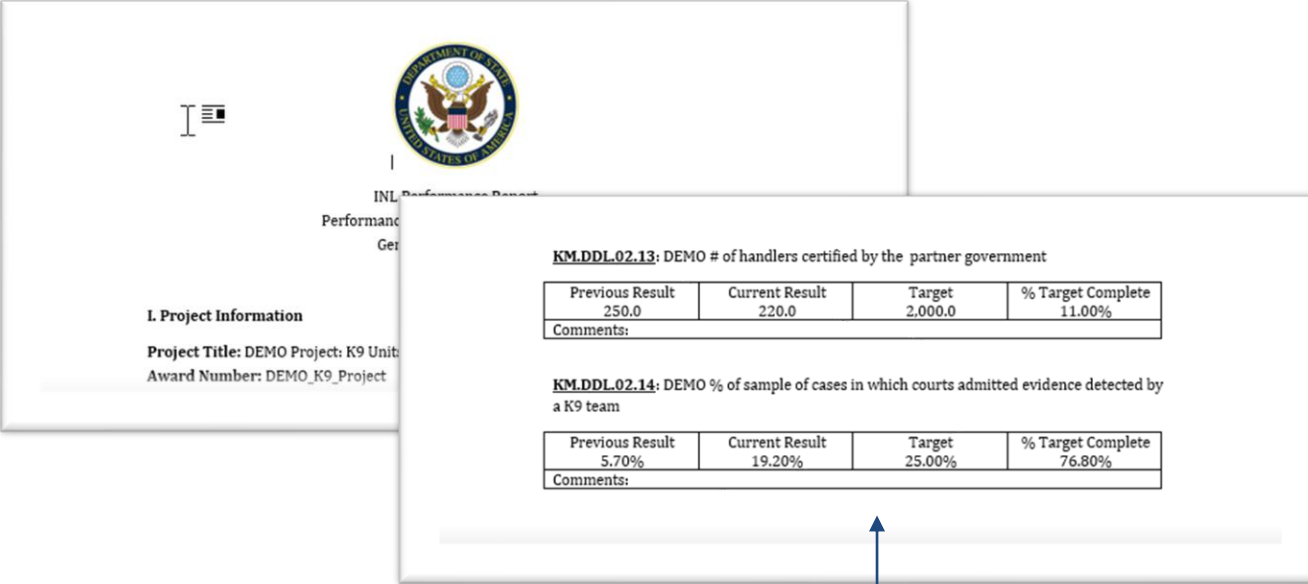
What Next?

Once targets have been set in DevResults, the system will track progress towards those targets as data are reported each period.

This progress can be viewed on the **Targets** tab for each indicator ("Actual % of Target"), or by generating the paper Performance Report using the INL Project Reporting Tool (PRT) and viewing each indicator's "% (Cumulative) Target Complete" column:

INL Performance Report

Performanc...
Ger...

I. Project Information

Project Title: DEMO Project: K9 Unit...
Award Number: DEMO_K9_Project

KM.DDL.02.13: DEMO # of handlers certified by the partner government

Previous Result	Current Result	Target	% Target Complete
250.0	220.0	2,000.0	11.00%
Comments:			

KM.DDL.02.14: DEMO % of sample of cases in which courts admitted evidence detected by a K9 team

Previous Result	Current Result	Target	% Target Complete
5.70%	19.20%	25.00%	76.80%
Comments:			

The Performance Report will display progress towards targets for all indicators in one list

Updating Targets

As stated in the [Overview](#), INL and Partners may update targets as needed.

To make these changes in DevResults, either:

1. **Overwrite** the existing targets (when [editing directly](#) on the indicator's Targets tab), **OR**

2. **Delete** the existing targets to be updated *before* uploading a new version of either the [per-indicator bulk template](#) or the [multiple-indicator bulk template](#). This is very important because **the bulk templates do not overwrite the existing targets entries**: if the existing entries to be updated are not deleted first, DevResults will keep both sets, **causing the Performance Report's Results and Targets fields to display with errors.**