

# Executive Director Monthly Dashboard Report Template

XYZ ORGANIZATION

Submit to board on the 15th of each month.

**Executive Director S.M.A.R.T. Goals:** Specific, Measurable, Achievable, Realistic, Time-related

YEAR	TARGET DATE	NOTES	STATUS
1. <b>Revenue and Expenses:</b> Achieve year-end net income goal of \$40K based on revenue of \$500K and expense of \$460K	12/31/22		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
2. <b>Operating Reserves:</b> Increase operating reserves from \$114K to \$154K (equivalent to 4 months of the FY 2021 expense budget)	12/31/22		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
3. <b>Board Member Recruitment:</b> Assist board with cultivating five new board prospects for quarter 1, 2023	10/31/22		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
4. <b>Three-Year Rolling Strategic Plan:</b> Based on board feedback, recommend final version of 2023-25 Strategic Plan to board	9/30/22		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
5. <b>Vision 2025 Resource Center:</b> Implement Phase 1 Pilot Program of Vision 2025 Virtual Resource Center, including cultivation, recruitment, orientation, engagement of two state coordinators, ten area coordinators, 50 local business sponsors, church ambassadors	9/15/22		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track

Date Submitted: \_\_\_\_\_ Period Covering: \_\_\_\_\_

Executive Director Signature: \_\_\_\_\_