# Template for Executive Dashboard

The Executive Dashboard should be one of the three central planning documents at the agency, along with the Mission and current Strategic Plan. The detailed program indicators and analyses would be 'under the water line' and not typically reported to the Board (similar to detailed financial statements).

Every staff person, contractor and consultant should be able to explain the key performance indicators and processes that they contribute to, and those indicators or processes should be reflected in their individual performance goals or contracts. The idea is to clarify what everyone is working toward, not to get tangled up in rigid bureaucratic categories. If you disagree with your annual performance goals you can probably negotiate changes to it.

The Executive Dashboard should be revised annually to refresh the indicators that matter to the Board, and should be reported every 3 months in a brief slide deck or 2 page document.

Figure 1: Central planning documents – Mission, Strategy and Executive Dashboard
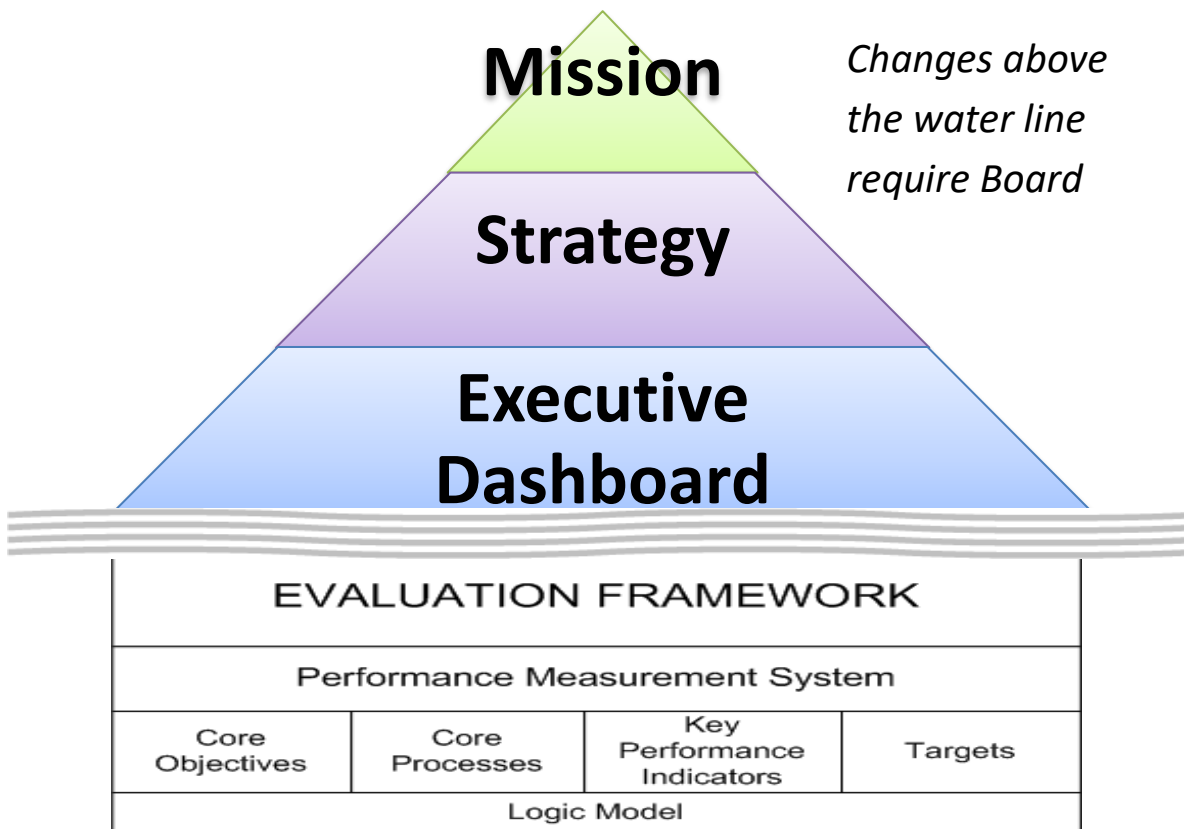
Executive Dashboard

Objective	Process Status	Key Performance Indicators [Examples]	Result Status	Actions in next 3 months [Examples]
1. [Mission statement, translated into a clear outcome if necessary]		• # of programs meeting and # not meeting specified objectives and milestones • # government policies changed or policy agendas moved in past 12 months (list and one-sentence summaries) • Progress on specific outcomes: [define a few indicators that Board members wish to review quarterly. They should relate to the mission, and be meaningful if reported every three months.]		Define objectives, milestones and minimum targets for each activity Decide which indicators should be reported to the Board
2. Increase net revenue		• Increase in total revenues compared to previous years • % of the agency dollars allocated to mission activities benchmarked against competitors +/or previous years • Reduction in non-value-added mission activity costs ($ saved) in previous 12 months • Progress on financial sustainability plan (e.g., business development pipeline)		
3. Manage performance [Includes finances, human resources, quality assurance, process improvement]		• # and status of planned improvement projects • # and results of implemented improvement projects (with qualitative description and/or quantitative data if available) • Staff engagement • Objectives and Key Results (OKRs)		
4. Maintain stakeholder satisfaction		• Consumer satisfaction with agency services (includes community leaders) • Partner satisfaction with agency programs (i.e., other organizations) • Funder satisfaction with agency programs • Content analysis of complaints from all stakeholders regarding all activities • Content analysis of media tracking and real-time web searches, including social media [organizations with large fundraising functions, can add a row for 'Build reputation and brand equity']		
5. Maintain good governance [Role of Board of Directors]		• Board satisfaction with Report Card targets, reports and follow-up actions • Compliance of governance processes with good practice • Succession plans for upcoming board retirements • Oversight and succession plans for CEO		

Rating Key for Dashboard – Select good icons that can be read in black and white printouts, e.g., star ratings.

PROCESSES: Are processes in place to manage performance toward this objective? - is the information trustworthy and relevant?	RESULT: Was the objective met?
0 The information is unavailable or untrustworthy.	0 Targets not defined or information not available
1 All core processes associated with this objective are documented but not all are measured or implemented according to procedure OR Some information of limited quality but good enough to understand trends	1 Did not meet **minimum target(s)** for at least one key performance indicator
2 All core processes associated with this objective are documented, implemented according to procedure and measured against established performance criteria OR Good quality information that can be used to compare with other years or programs	2 Met or exceeded **minimum targets** for most key performance indicators, and for all essential indicators
	3 Met or exceeded desired targets for some key performance indicators while achieving **minimum results** for all of them.