Your Logo Here

Non-Profit Example

revised on 2/1/2009

Primary:

key:

- Item is moving forward as planned, no issues
- Item is 'on hold' or has some identified delay
- Item is stopped or not progressing, needs to be discussed, needs resources

Tactical Dashboard 2009: OPERATIONS/LEGAL

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes
50%	*NG*	*Goal: Organizational Effectiveness*	*Update/revise operations manual*	*Complete by March 2009*	*Waiting for information from xzy*

Alana:
just because a project is under a particular dept, doesn't mean it doesn't have more then 1 person responsible for its success

Alana:
In this box use both the status color and percentage to indicate status of work -

Alana:
This column is to identify the big goals that the group is working on - each group should have 2-3 primary goals/objectives that are constant

Alana: tasks are the projects/activities that need to be completed in order to achieve the goal. You will have more tasks compared to the goals. You can also define priorities - such as high, med, low

Alana:
identify a date or a metric like attendance of 1500 people for an event that helps keep you focused on the successful completion of the task

Alana:
A place to make add'l notes and updates.

When a task is complete, you can either use the font color of grey to "grey it out"..or move it to the bottom of the list, it is important to not just delete completed tasks because you want to see over a period of time the work you have accomplished. Consider archiving the dashboard maybe once a quarter or once a month - and then you can remove old/completed tasks - but still have a record of what has been accomplished.

One of the most important things the team can do …is make it their own, if the headers don't work then change them..but it should be consistent from department to department if possible (although there might be the need for some customization

The goal of the dashboard is to keep the team organized, accountable, and help define/set priorities. It is a great tool for staff meetings - where you can quickly mention the "greens" but then focus your time on the yellows and maybe even more importantly the 'reds' because these are items that for some reason are not 'moving forward' so the team can work together to figure out what needs to change to get the task going forward..or maybe the decision is that the task is not worth pursuing at the moment..whatever it is..this tool can really help you be efficient in meetings - focusing on the stuff that matters.

This is also a terrific tool to bring to a board meeting so you can show progress or discuss areas that need to be discussed…at a board meeting you can bring all the pages..or ou can summarize each group - without the details.. , see the last page

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Tactical Dashboard 2009: OPERATIONS/LEGAL

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

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Tactical Dashboard 2009: FINANCE

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

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Tactical Dashboard 2009: COMMUNICATIONS & MARKETING

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

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Tactical Dashboard 2009: SPONSORSHIP

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

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Tactical Dashboard 2009: MANAGEMENT, DEVELOPMENT, BOARD

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

Your Logo Here

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Tactical Dashboard 2009: GREAT PROGRAMS & WEBINARS

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

Your Logo Here

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Tactical Dashboard 2009: ADMINISTRATION & VOLUNTEER COORDINATION

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

Your Logo Here

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Tactical Dashboard 2009: IT

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

Your Logo Here

Non-Profit Example

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Tactical Dashboard 2009: GRANTS & EDUCATIONAL PROGRAM DEVELOPMENT

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

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Tactical Dashboard 2009: EVENT PLANNING & MEET UPS

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes

Your Logo Here

Non-Profit Example

revised on *2/1/2009*

Primary: TEAM

key:

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Tactical Dashboard 2009: TEAM SUMMARY

Status/% Comp	Champion	Department	Primary Goal(s)	Milestone/Measure of Success	Comments/Notes
		Operations			
		Finance			
		Communications & Marketing			
		Sponsorship			
		Management, Development, Board			
		Programs & Webinar			
		Volunteer Coord & Admin			
		IT			
		Grants & Educ Program			
		Event Planning & Meet ups			