SAMPLE TEMPLATE FOR A NONPROFIT MINISTRY

(Color-Code Each Monthly Progress Report)

**S.M.A.R.T. Goals are:** ➜ **S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**ime-related.

**ABC Ministry – CEO Monthly Dashboard Report (2020)**

# Annual TOP-5 SMART GOALS for Jane Doe

*Monthly Update to be submitted to Board of Directors by the 15th of each month.*

These FY2020 TOP-5 SMART GOALS were approved by the Board of Directors on Dec. 15, 2019

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| --- | --- | --- |
| **FY 2020 – 3 Months****January 1 – March 31, 2020***Updated on April 15, 2020 by Jane Doe* | **Target Date** | **Monthly Update 3-Month Report Ending 3/31/2020** |
| **1.**  |  |  |
| **2.**  |  |  |
| **3.**  |  |  |
| **4.**  |  |  |
| **5.**  |  |  |

⬆ Color-code each box based on the monthly update.

|  |  |  |
| --- | --- | --- |
| **GREEN****on Target** | **YELLOW****Caution!** | **RED****Alert!** |

**6 Questions for the Board About . . .**

Your CEO’s (or Senior Pastor’s) Top-5 S.M.A.R.T. Goals

* 1. Have we used a spiritual discernment process to discern these goals?
* 2. Are our goals and budget in alignment with our mission and our theology?
* 3. Specifically, what are the *Top-5 Goals* that the board wants our CEO/Senior Pastor to achieve this year? (Do they meet the “S.M.A.R.T.” criteria?)
* 4. What are the *Top-5 S.M.A.R.T. Goals* each direct report to the CEO/Senior Pastor must achieve this year?
* 5. Has the board discussed, discerned, and affirmed no more than five goals for the top leader— and are they in writing and recorded in the board’s minutes?
* 6. Does the board receive the *Monthly Dashboard Report* from the top leader—every month?