



## Organizational Strategic Priorities Tracking Matrix

The following is a draft strategic priorities tracking matrix that we believe will help an organization as it develops its plan, but also assist in tracking and evaluation. This is simply a draft plan with goals compiled from multiple organizations and industries.

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### (Organization Name)

**Mission:** (Insert your Board approved mission statement at the top of the plan. It's important to always keep this front and center. Mission statements should say what you do and how you do it. Mission statements are NOT vision statements. They do not tell you what the world looks like if you achieve your goal, but rather what you do to get towards that goal. Examples of good mission statements include: 1) Promote the success and growth of the LGBT and allied business community in the state through education, networking, and advocacy; 2) Our mission is to feed America's hungry through a nationwide network of member food banks and engage our country in the fight to end hunger; 3) We prevent and alleviate human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors; 4) To enhance quality of life for all as we age, we lead positive social change and deliver value to members through information, advocacy and service; etc.)

**Vision:** (Insert a vision statement here. A vision statement needs to be bold, direct and tell what the world looks like if you accomplish your mission and your strategic priorities. Vision statements should NOT be a different form of a mission statement. Examples of good vision statements include: 1) Economic and social equity for all people; 2) A cure for all children with cancer; 3) A hunger-free community; 4) A world where everyone has a decent place to live; etc.)

**Organizational Values:** (While not required, it's helpful to input your organizational values here. These should be three to five words that describe the values of the organization. These help guide the work and further define who you are. Examples include: Innovative, Intersectional, Excellence, Integrity, Professional, Elite, Good Stewards, etc.)

**Strategic Priorities**

During its (Date) planning retreat/meeting, the board of (Organization) produced a (Years - 3, 5, 10 years) Strategic Plan.

The (Organization) developed four strategic priorities that will guide the work of the organization. Those priorities are:

1. Create high quality, impactful programs for the benefit of our members’ businesses and lives
2. Enhance brand awareness and visibility of the organization
3. Advance policies and laws that support the business community
4. Strengthen organizational infrastructure to support long-term growth and sustainability

Within each of the strategic priorities, the Board also developed some key outcomes/tasks that will drive the goal forward and help achieve that priority. Those tasks were also ranked or tiered to show priority moving forward.

In order to evaluate and monitor organizational success on the strategic priorities, this matrix can help track and be used to report at each board meeting.

This is the code to monitor status. Goals that haven’t been started yet can be left blank until they need to begin.

Evaluation Code	
	RED LIGHT: Area of concern, behind expectations, need to assess outcome/process
	YELLOW LIGHT: Needs ongoing monitoring, potential area of concern
	GREEN LIGHT: On track to meet or exceed expectations

**PRIORITY ONE: Create high quality, impactful programs for the benefit of our members' businesses and lives**

TIER	OUTCOME	OWNER	DEADLINE	STATUS
1	Launch an Annual Business Educational Summit			
1	Create Industry-Specific Councils within Organization			
1	Launch Quarterly Lunch & Learns in Western Counties			
2	Conduct a Business Expo and Awards Luncheon			
3	Launch a Business Academy for professionals			
3	Launch a mentorship program for entrepreneurs			
<b>GOAL ONE OVERALL ASSESSMENT</b>				

**PRIORITY TWO: Enhance brand awareness and visibility of the organization**

TIER	OUTCOME	OWNER	DEADLINE	STATUS
1	Review complementary sponsorships			
1	Review membership levels (particularly sponsorship levels) and breakfast costs			
2	Increase corporate memberships/sponsorships			
2	Increase individual memberships			
2	Increase membership by 12 net members yearly			
<b>GOAL TWO OVERALL ASSESSMENT</b>				

<b>PRIORITY THREE: Advance policies and laws that support the business community</b>				
<b>TIER</b>	<b>OUTCOME</b>	<b>OWNER</b>	<b>DEADLINE</b>	<b>STATUS</b>
1	Establish legislative priorities and create a legislative agenda			
1	Host an elected official meet and greet with members			
2	Establish a Political Action Committee			
3	Endorse candidates in municipal elections			
<b>GOAL THREE OVERALL ASSESSMENT</b>				

<b>PRIORITY FOUR: Strengthen organizational infrastructure to support long-term growth and sustainability</b>				
<b>TIER</b>	<b>OUTCOME</b>	<b>OWNER</b>	<b>DEADLINE</b>	<b>STATUS</b>
1	Formalize leadership succession plan (board and staff)			
1	Develop budget forecasting models			
2	Re-examine membership levels			
2	Implement non-dues revenue program			
3	Hire full-time Staff Director			
<b>GOAL FOUR OVERALL ASSESSMENT</b>				