Strategic Plan Tracking Matrix Template

This basic template can be used at the staff level and at the board level, with only minor modifications. The staff level matrix will be a full work plan, with action steps listed under each goal (i.e. (a) apply for program funding for X, (b) if funding awarded, do Y, Z etc.). The board-level matrix would have less detail. The Next Steps column is used in the board format to indicate only large next steps (at the level the board needs to be aware of), whereas in the staff level version, it will be detail-oriented.

Primary Objective/Task	Year to be done	Qtr (yr 1)	Has Primary Responsibility	Board Roles	Other Support Roles & Prtnrshps	Funding Status	Key Dates & Deadlines	Next Steps	Activity Status
Name of Program									
If you have multiple programs, list objectives and work items organized by program, using a letter code for each program (i.e. PP for public policy, PE for public education, FR for fundraising), with the objectives numbered, and work tasks organized under each objective in bullets. *Each program area should include the "unpredicted demands and new activities" category below, to be filled in as the year goes on.*	*Only needed if you are trackng a multi-year work plan*		*Staff person, board member or volunteer responsible (may be more than one, but best to note who is ultimately responsible for making sure it happens.)*	*i.e. Review and approve new contracts; Approve budget that includes these fund; Do fundraising; Organize events; etc You could have a column for committee assignments or put them here.*	*Other people who play roles in getting this accomplished.* *Organizations you would partner with to accomplish this.*	*i.e.: In the bank; Committed; Applied for; Funder identified; Unknown. Include a comment on likelihood if applicable. Name the funder where possible.*	*Proposal deadline; Date new programs would start if contract awarded (grant received, etc.); New hire date, funding deadlines, decision-points, etc*	*What should be done this coming quarter.*	*i.e.: Staff working on proposal; Waiting on grant decision; etc.* *This is the column used to note when things have been accomplished*
X-1 through X-? *Program goals specific to the strategic plan (as many as exist, each with their own number)*									
X-? through X-? *Articulation of existing (on-going) work (as many goals as exist, each with their own number)*									
X-? Unpredicted demands and new activities *Will be added as they arise so they can be incorporated into the tracking and prioritization*									