DMO Board Dashboard

Template — not legal advice, and not financial advice. Blank on purpose: no industry benchmarks are included. Use the measures your marketing plan and funding agreement already name, define each one below, and keep the definitions the same every quarter.

Organization: _____ Quarter: _____ Prepared by: _____ Sent to board on: _____

1. Funding

Source	Received this quarter	Forecast	Year to date	Year-to-date forecast	Comment
Lodging tax share or assessment					
Grants and public contracts					
Partner and member revenue					
Total					

2. Spending by permitted use

Permitted use (from the funding agreement)	Budget	Spent year to date	% of budget	Comment
Administration (if capped, show the cap)				

☐ No spending outside permitted uses this quarter (finance committee confirms)

3. Marketing plan measures

Measure (as named in the plan)	Target	This quarter	Year to date	Source of the data

4. Grants and cooperative programs

Program	Awarded this quarter	Recipients	Any director-related recipient? Recusal recorded?

5. Governance and deadlines

Item	Due	Status
Report to funder		
Audit or financial review		
Funding-agreement or district renewal step		
Executive director evaluation		
Annual conflict-of-interest disclosures		

☐ Meetings noticed and minutes posted as counsel advised (if open-meeting rules apply)

6. Risks

Risk	What changed this quarter	Owner
Funding below forecast		
Renewal or legislative change		

Definitions (fill in once, keep constant)

- **Received:** cash received in the quarter, or amount earned (state which).
- **Forecast:** the forecast adopted with the budget; note any board-approved revision.
- **Permitted use:** the categories in the funding agreement or district plan, with section references.
- **Each marketing measure:** what is counted, from what source, and over what period.

Related: Governing a destination organization (https://preparedboard.com/guides/dmo-tourism-board-governance) · DMO funding agreement compliance checklist (https://preparedboard.com/templates/dmo-funding-agreement-compliance-checklist) · DMO annual board calendar (https://preparedboard.com/templates/dmo-annual-board-calendar).

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