



GOAL BRAINSTORMING WORKSHEET



SET GOALS FOR A BRIGHTER FUTURE

Board members of a homeowners' association (HOA) are tasked with running an efficient and financially sound community. To do this, you must set realistic goals aimed at enhancing the overall living experience. However, creating these impactful initiatives and following through with them can be challenging without the proper preparation and planning.

At Associa, we have decades of experience helping boards set and reach meaningful goals for their communities. Our Board Goal-Setting series offers **free** resources to help you set goals, track progress, and meet milestones. In this first installment, you'll find a Goal Brainstorming Worksheet complete with tools and tips to encourage idea sharing. Read on!



EXAMPLES OF GOALS

HOA goals can be broken down into three categories. **Annual goals** are set every year to maintain operations, compliance, and adequate funding. **Improvement goals** are related to maintenance projects and general upkeep of the community. **Communication goals** improve transparency, collaboration, and resident engagement.

Examples of HOA goals include:

- Prepare the annual budget by a particular date.
- Remodel the community pool deck.
- Create a formal complaint process.
- Invite monthly speakers for community events.
- Find a more affordable option to replace an overpriced vendor.
- Invest in technology that allows homeowners to pay fees online.

Because every association is unique, review your governing documents, know your budget, and consider homeowner priorities before developing strategic plans.





GOAL BRAINSTORMING

When considering a goal for your association, it's helpful to brainstorm potential ideas before fully committing your time and energy to a particular plan. This stage in the goal-setting process is all about exploring possibilities, categorizing goals, and aligning intentions with your community's needs.

Once you've brainstormed your potential goals, you can move forward to establishing them in your goal-setting worksheet.

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GOAL BRAINSTORMING WORKSHEET

Choose an HOA goal category (annual goal, improvement goal, or communication goal) and write it into the **MAIN CATEGORY** box. Then, fill in the **POTENTIAL GOAL** box with your primary goal and the surrounding boxes with supporting goals. Make copies and repeat this process for each HOA goal category to narrow down the most impactful goals for your community.



GOAL BRAINSTORMING WORKSHEET

MAIN CATEGORY

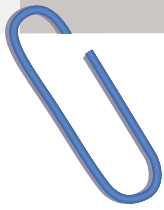


POTENTIAL GOAL

SUPPORTING GOALS



GOAL BRAINSTORMING WORKSHEET EXAMPLE



MAIN CATEGORY

Improvement Goal

POTENTIAL GOAL

Remodel the community pool deck

SUPPORTING GOALS

Secure funding

Find a contractor

Schedule the remodel



WHAT'S NEXT?

After brainstorming goals, what happens next? To help you work through the information you've gathered, check out our other worksheets. These templates allow you take your ideas further and streamline for maximum efficiency.

Additional resources coming soon:

- SMART Goals: Out October 2025
- Goal Setting: Out October 2025
- Goal Review: Out November 2025
- Monthly Planner: Out November 2025

Keep checking CMA's Board Blog as we publish them to that page throughout October and November.





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