



GOAL PLANNING WORKSHEET



ACTING ON GOALS

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

At CMA, we have decades of experience helping boards set and reach meaningful goals for their communities. Our board goal-setting series offers free resources, so you can set goals, track progress, and meet milestones. Here, you'll find a Goal Planning Worksheet that'll allow you to act on your goals with strategy and focus. Read on!



HOW TO ACHIEVE GOALS

After you've defined and set your goals in our [SMART Goals Worksheet](#), it's time for your board to implement a plan to achieve them. This involves breaking up your goals into actionable steps, assigning responsibilities, and setting realistic deadlines for each action item.



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GOAL PLANNING WORKSHEET

This worksheet creates an overarching execution plan that acts as a roadmap to achieve your goals. For each HOA goal, fill in five specific action items that must be completed, which board member is responsible for each step, and when it must be accomplished.



GOAL PLANNING WORKSHEET

GOAL:

#	WHAT	WHO	WHEN
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GOAL PLANNING WORKSHEET EXAMPLE

GOAL:

Increase homeowner attendance at board meetings by 25% in 6 months through improved communication and events.

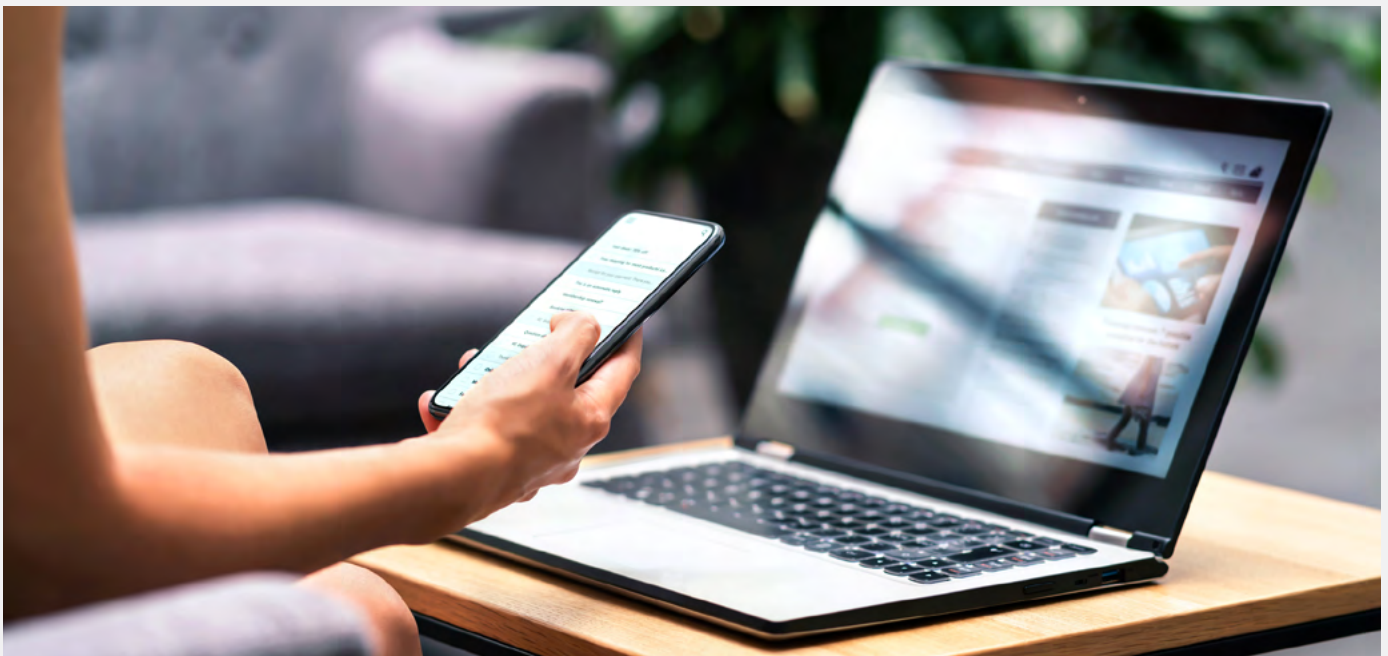
#	WHAT	WHO	WHEN
1	Launch a multi-channel communication campaign that includes email newsletters, fliers, social media, and the community app.	John H.	Send reminders 2 weeks, 1 week, and 1 day before each board meeting.
2	Incentivize meeting attendance. Gather and apply the necessary resources to offer small perks for attending, especially for first-time attendees or those who bring a neighbor.	Karla Z.	Formalize incentives 2 weeks before the next board meeting.
3	Organize a 30-minute, pre-meeting social event, like a coffee meetup or pizza with the board, to encourage attendance in a more relaxed environment.	William B.	Solidify plans and secure the necessary resources and funding in 1 month.
4	Review and update meeting content, including the agenda and reports, to simplify and make the meeting more engaging.	Brittany J.	Approve updated content at least 2 weeks before the next board meeting.
5	Track and evaluate progress to ensure efforts are affecting measurable change.	Kevin T.	Monthly after each board meeting.

ADDITIONAL RESOURCES

Check out our other worksheets to help you through your goals journey. These templates let you develop your ideas further and streamline for maximum efficiency.

Additional resources:

- Goal Brainstorming
- SMART Goal Setting
- Goal Review: Out November 2025
- Monthly Planner: Out November 2025



A modern, multi-story apartment building with a mix of grey, blue, and yellow siding. The building features large glass windows and balconies with glass railings. The balconies are illuminated from within, showing warm interior lights. In the foreground, there is a well-maintained courtyard with green grass, a paved walkway, and several manicured bushes and small trees. The sky is overcast with soft, grey clouds.

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