



GOAL REVIEW WORKSHEET



COMMUNITY MANAGEMENT
ASSOCIATES, INC.

www.cmacommunities.com



INTRODUCTION

Setting goals is one of the best ways to make a real impact in a homeowners' association (HOA). However, it's important that boards follow through on their goals to reach their vision of a better and more successful community.

At CMA, we have decades of experience helping boards set and reach significant goals for their communities.

Our Board Goal-Setting series offers free resources, so you can set goals, track progress, and meet milestones. Here, our Goal Review Worksheet is a valuable tool you can use to evaluate your goals and make sure you're on pace to meet them.

Read on!



THOUGHTFUL REVIEW SPURS MEANINGFUL CHANGE

While it's important for boards to plan—and act on—goals that enhance community living, it's equally crucial to track your progress throughout the goal's lifespan. Reviewing goals monthly helps you:

- Stay motivated
- Adapt to new challenges
- Keep your goals ingrained in your work
- Monitor progress

GOAL REVIEW WORKSHEET

Use this worksheet to assess what's working, what isn't working, and what's changed.

DATE:

GOAL CATEGORY:

GOAL:

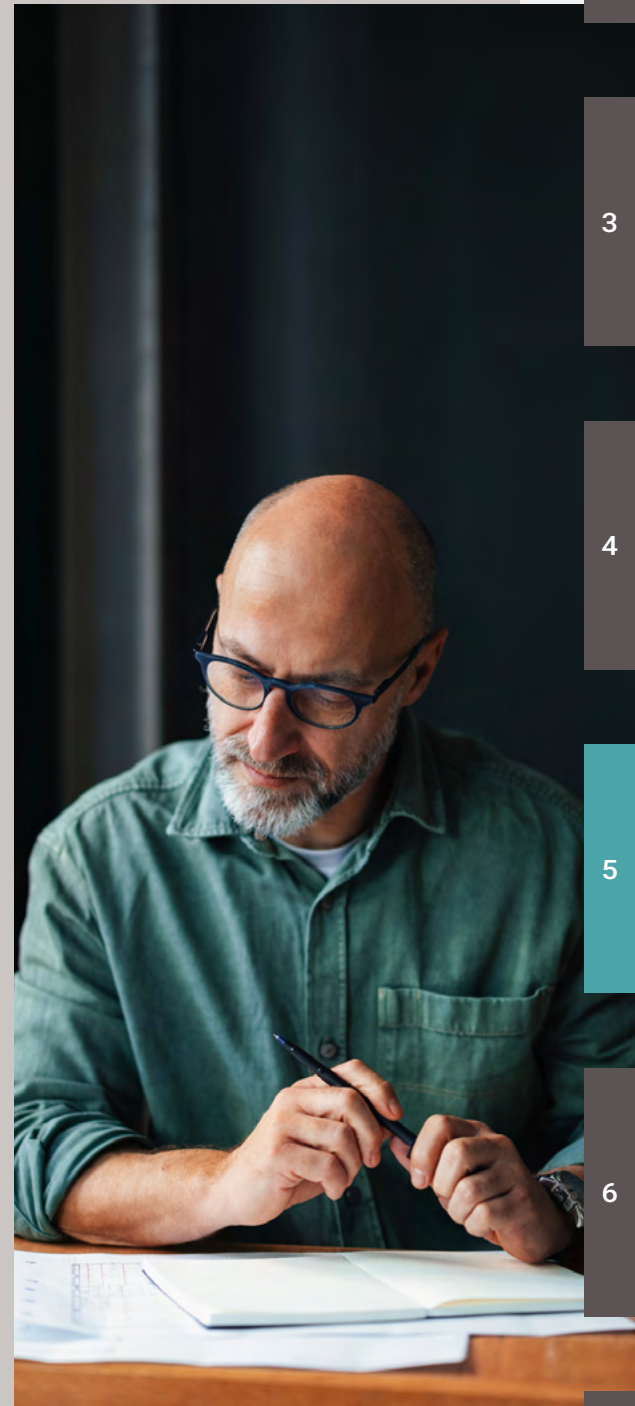
CHECK-IN QUESTIONS

- What's the purpose of this goal?
- Are we on track to meet this goal?
- What's going well? Why?
- What are the biggest challenges? Why?
- Which action items are most effective? Which aren't?
- What priorities, circumstances, or resources have changed and affected the direction of this goal?
- Are there any redundant or unnecessary tasks assigned to this goal?
- What additional action items will help us achieve this goal?
- What additional resources or support do we need to achieve this goal?
- What timeline makes sense for the next phase of this goal?

WHAT TO DO WITH WHAT YOU'VE LEARNED

Are you on track to achieve your goals? Do they still make sense? This is your chance to answer all the important questions.

By evaluating goals regularly, you turn action into **intentional progress**, keeping your board's efforts aligned, effective, and meaningful. Use this opportunity to celebrate your progress, address any challenges, and maintain your motivation to meet the objectives you've set. If your goals need changing, don't hesitate to adjust them so they're properly aligned with your vision.



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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 Planning](#)
- Monthly Planner: Out November 2025



Leave *community management* to us.

CMA is a partner you can trust to lead your community to success. Providing top-tier management, secure financials, customizable insurance, and advanced technology, our comprehensive suite of services creates greater efficiencies. Lean on CMA for professional management support, so you can focus on what matters most to your community.

