Goals Stepback Worksheet

Use this worksheet to track progress and share updates about your team or individual goals on a regular basis. Use the questions below to discuss progress and next steps with your manager. You can also check out our [**Red Light/Green Light Goal Tracking Tool**](https://www.managementcenter.org/resources/red-light-green-light-goal-tracking-tool/) to track progress year-round.

# Quarter X Stepback (as of mm/dd)

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| **Goal** | **Current Status**  *(On track / Not started yet / Not on track)* | **Updates** | **Key Next Steps** |
| *Grow the grassroots power of our membership base. By end of year, at least 2,500 people (of which 40% identify as BIPOC) will have been trained through our leadership development programs. At least 80% of participants will answer yes to the statement "I would recommend this program to a friend."* | *[[1]](#footnote-1)Not yet on track* | *We should have enough trainings scheduled in the second half of the year to hit our overall goal, but need to do additional outreach to get to 40% BIPOC.* | *Reach out to Maria and Cynthia about recruitment; make a push on social media channels.* |
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## Questions for discussion

* What else needs to happen to achieve \_\_\_?
* Is there anything you should be starting on now in anticipation of what’s coming up in the next few months?
* (For goals that are not on track) What’s happened to throw us off-track? What are you doing to restrategize your plan for that goal?
* What could go wrong? What worries you? What can you do to plan now for those possibilities?
* Are there items that have been deprioritized that we should move to the front burner now? Are there items that we should be focusing less on now, in favor of higher priorities?
* What has been going well that you want to continue doing?

1. ***On track:*** *Likely to achieve this goal or already completed;* ***Not started yet:*** *Have not started making progress yet;* ***Not on track:*** *Significantly behind or off track* [↑](#footnote-ref-1)