

Instructions for Completing Goal & Milestone Chart

Please complete the following:

Cell A1, include Network Name and State

Cells B2 - B4, include calendar year, name of recipient, and SBA Project Officer name

Complete Blocks 1 – 5 with the requested details

Goals, Block 6

Place cursor in Cell J67

Using the Pick List, Select Focus Area from list in Cell J67

Place cursor in Cell J68

Using the Pick List, Select Metric choice from list in Cell J68

*Note: If you select a different Focus Area, be sure to reselect a valid Metric from the list.

The variables under each Focus Area will display in the Pick List and to the right of Block 6.

Include Service Center listing in Column A and each center's metric allocations, by quarter, in Columns D, F, I, and K

Ensure that your network total, Row 110, is at least equal to your goal allocation for the period.

Network Planned Milestones Worksheet - (*NETWORK NAME*) SBDC, (*STATE*)

Program Year (CY): *Award Year*

Recipient Organization: *Recipient*

SBA Project Officer : *Project Officer name*

(NOTE: Insert or delete rows as needed. Do not delete classification headings. Do not leave excess space)

1. MAJOR PROGRAM OBJECTIVES

OBJECTIVE 1

OBJECTIVE 2

OBJECTIVE 3

OBJECTIVE 4

OBJECTIVE 5

OBJECTIVE 6

2. SPECIAL PROJECTS

PROJECT 1

PROJECT 2

PROJECT 3

PROJECT 4

PROJECT 5

PROJECT 6

6.GOALS

	Clients Advised		New Business Starts		Capital Infusion Transactions		Focus Area: <i>(Fill In Below)</i>	
							<i>Choose Goal</i>	
							<i>Choose Measure Here</i>	
Name of Service Center	Total	0	Total	0	Total	0	Total	0
	1st Qtrr		1st Qtrr		1st Qtrr		1st Qtrr	
	2nd Qtrr		2nd Qtrr		2nd Qtrr		2nd Qtrr	
	3rd Qtrr		3rd Qtrr		3rd Qtrr		3rd Qtrr	
	4th Qtrr		4th Qtrr		4th Qtrr		4th Qtrr	
Name of Service Center	Total	0	Total	0	Total	0	Total	0
	1st Qtrr		1st Qtrr		1st Qtrr		1st Qtrr	
	2nd Qtrr		2nd Qtrr		2nd Qtrr		2nd Qtrr	
	3rd Qtrr		3rd Qtrr		3rd Qtrr		3rd Qtrr	
	4th Qtrr		4th Qtrr		4th Qtrr		4th Qtrr	
Name of Service Center	Total	0	Total	0	Total	0	Total	0
	1st Qtrr		1st Qtrr		1st Qtrr		1st Qtrr	
	2nd Qtrr		2nd Qtrr		2nd Qtrr		2nd Qtrr	
	3rd Qtrr		3rd Qtrr		3rd Qtrr		3rd Qtrr	
	4th Qtrr		4th Qtrr		4th Qtrr		4th Qtrr	
Name of Service Center	Total	0	Total	0	Total	0	Total	0
	1st Qtrr		1st Qtrr		1st Qtrr		1st Qtrr	
	2nd Qtrr		2nd Qtrr		2nd Qtrr		2nd Qtrr	
	3rd Qtrr		3rd Qtrr		3rd Qtrr		3rd Qtrr	
	4th Qtrr		4th Qtrr		4th Qtrr		4th Qtrr	
Name of Service Center	Total	0	Total	0	Total	0	Total	0
	1st Qtrr		1st Qtrr		1st Qtrr		1st Qtrr	
	2nd Qtrr		2nd Qtrr		2nd Qtrr		2nd Qtrr	
	3rd Qtrr		3rd Qtrr		3rd Qtrr		3rd Qtrr	
	4th Qtrr		4th Qtrr		4th Qtrr		4th Qtrr	
Name of Service Center	Total	0	Total	0	Total	0	Total	0
	1st Qtrr		1st Qtrr		1st Qtrr		1st Qtrr	
	2nd Qtrr		2nd Qtrr		2nd Qtrr		2nd Qtrr	
	3rd Qtrr		3rd Qtrr		3rd Qtrr		3rd Qtrr	
	4th Qtrr		4th Qtrr		4th Qtrr		4th Qtrr	

	Clients Advised		New Business Starts		Capital Infusion Transactions		Focus Area: <i>(Fill In Below)</i>	
							<i>Choose Goal</i>	
							<i>Choose Measure Here</i>	
Name of Service Center	Total	0	Total	0	Total	0	Total	0
	1st Qtr		1st Qtr		1st Qtr		1st Qtr	
	2nd Qtr		2nd Qtr		2nd Qtr		2nd Qtr	
	3rd Qtr		3rd Qtr		3rd Qtr		3rd Qtr	
	4th Qtr		4th Qtr		4th Qtr		4th Qtr	
TOTALS:		0		0		0		0

Demonstration Area: You have the following options:

Focus Area

Choose Goal

Measure

Choose Measure Here