## Activity 1: Waterfall Goals Chart

|  |  |  |  |
| --- | --- | --- | --- |
| **Strategy & Long-Term T4TLA Goal***(Lagging indicators that reflect our big-picture goal)* |  | **Strategy**: |  |
|  |
| **Long-Term T4TLA Goal**: |
|  |
| **Leading Indicators***(Shorter term goals that help us know our strategies are working)* | **Leading Indicator 1** | **Leading Indicator 2** | **Leading Indicator 3** |
|  |  |  |
| **Strategies and Measurable Responsibilities***(Action steps that are taken to reach our goals)* | **Strategies/Responsibilities** | **Strategies/Responsibilities** | **Strategies/Responsibilities** |
|  |  |  |

## Activity 2: T4TLA Monitoring Plan

| **Strategy, Goal, and Leading Indicator(s)** | Name of T4TLA Strategy |  |
| --- | --- | --- |
| Long-Term Goal of Strategy (Lagging Indicator) |  |
| Leading Indicator(s) | Indicator 1 | Indicator 2 | Indicator 3 |
|  |  |  |
| **Step 1. Establish a Monitoring Plan** | How often will our team monitor progress toward each leading indicator?  |  |  |  |
| What evidence will we collect of our progress toward each leading indicator? |  |  |  |
| How will we know we are on track toward meeting our long-term goal?  |  |  |  |
| What are our interim benchmarks? *(Adjust time intervals as needed to match monitoring intervals.)* |
| *Summer 2017 Benchmark* |  |  |  |
| *Fall 2017 Benchmark* |  |  |  |
| *Winter 2017–18 Benchmark* |  |  |  |
| *Spring 2017 Benchmark* |  |  |  |
| What might we do to course correct if we are not on track to meet our long-term goal according to the benchmarks established? |  |  |  |
| Who will be responsible for monitoring progress for this indicator? |  |  |  |
| **Step 2. Monitor Progress and Identify Evidence** | What is the monitoring interval (for example, three months, six months)? |  |  |  |
| Did our team do what was planned in our strategy? |  |  |  |
| How do we know? What is the evidence—meeting agendas, data collection, other artifacts or evidence? |  |  |  |
| How much progress have we made toward our goal? |  |  |  |
| Do we need to make any adjustments at this time? *(Indicate yes or no. If no, planning will take place in Step 3.)* |  |  |  |

| **Strategy, Goal, and Leading Indicator(s)** | Name of T4TLA Strategy |  |
| --- | --- | --- |
| Long-Term Goal of Strategy (Lagging Indicator) |  |
| Leading Indicator(s) | Indicator 1 | Indicator 2 | Indicator 3 |
|  |  |  |
| **Step 3. Self-Correct and Course Correct as Needed** | What went wrong? *(Use the self-reflection questions in this section to guide the answer.)* |  |  |  |
| Would the course corrections we noted in Step 1 help get our team back on track? *Revisit the possible course corrections from the monitoring plan (Step 1).* |  |  |  |
| What will we do to course correct? |  |  |  |
| What new benchmarks will we establish for monitoring progress as needed? |  |  |  |
| *Three-month benchmark* |  |  |  |
| *Six-month benchmark* |  |  |  |
| *One-year benchmark* |  |  |  |
| *Two-year benchmark* |  |  |  |