

Strategic Planning Checklist Background

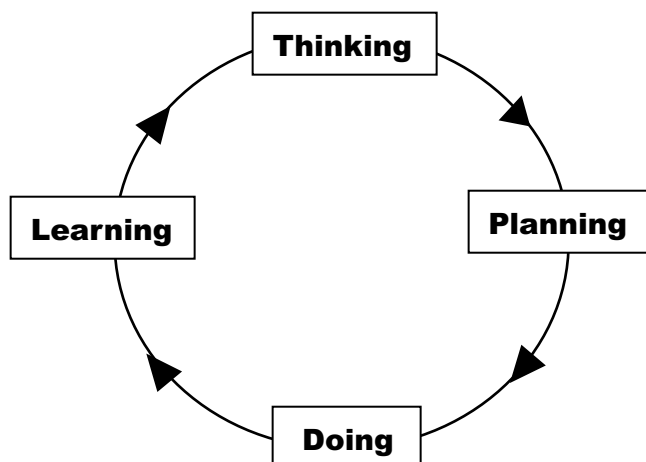
Drawing from his experience as a general surgeon, Atul Gawande's *The Checklist Manifesto* (2009) reveals evidence on how using a simple checklist can reduce errors in complex professions such as aviation, engineering and medicine.

This same checklist methodology is applied here to the use of strategic planning in higher education which is often defined as “bringing the future into the present so that you can do something about it now.”

The exhaustive examination of strategic planning at more than 250 colleges and universities compared their activities against an organizational learning cycle in the book:

Strategic Planning in Uncertain Times Fieldbook (2023)

The subtitle of the *Fieldbook* is “17 Critical Mistakes to Avoid in Higher Education” with these mistakes occurring relative to the organizational learning cycle: “Thinking” or planning to plan (5), “Planning” or creating a product (13), “Doing” or implementing the plan (3), and “Learning” or reflecting on implementing the plan.



The checklist that follows are 17 questions that are designed to avoid the critical mistakes or errors that are fully described in the *Fieldbook*. As such, this exercise is best introduced initially in the Thinking stage of the strategic planning process as a group of stakeholders is “planning to plan.” It also helps remind us that the real utility of strategic planning is when it is approached as a dynamic process that drives institutional advancement, rather than just as a static product that is often forgotten not long after it is initially presented.