Strategic Planning Checklist – SurveyMonkey

Q1 Having committed and visible leadership: *Are there senior leaders (president, chancellor, provost) willing and able to lead the strategic planning process?*

Yes ☐   No ☐

Q2 Seeking and using expert advice: *Are individuals within the institution (or outside experts) identified with specific skills associated with strategic planning; and is there a commitment to broad training of committee members?*

Yes ☐   No ☐

Q3 Reflecting on past planning: *Is the institution and its leaders aware of previous strategic plans, implementation efforts, and engage in a "lessons learned" exercise?*

Yes ☐   No ☐

Q4 Conducting pre-planning: *Is there a commitment to develop and document a robust description of how the extended strategic planning process will take place and who will be directly involved?*

Yes ☐   No ☐

Q5 Communicating pre-planning: *Are the leaders and experts committed to communicate with the institution's stakeholders about how the planning will proceed?*

Yes ☐   No ☐

Q6 Asking and answering basic questions: *Will leaders, experts, and committee members conduct research about best practices associated with its mission, vision, and values and their relationship to the strategic plan?*

Yes ☐   No ☐

Q7 Being brutally honest: *Do the leaders, experts, and committee members understand the necessity to engage in courageous conversations about problems and challenges that are facing the institution now and in the future?*

Yes ☐   No ☐

Q8 Challenging the status quo: *Does everyone involved understand that the process is designed not to reinforce the status quo but rather to question existing assumptions?*

Yes ☐   No ☐

Q9 Doing your due diligence: *Is there a willingness and ability to generate comprehensive data sets and trends about internal processes and external environments?*

Yes ☐   No ☐

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Q10 Aligning people, policies and practices: *Does everyone involved understand the importance to align the internal units within a "loosely-coupled" institution and with key external government agencies and accreditation organizations?*

Yes ☐   No ☐

Q11 Choosing priorities: *Is there a process to be used to ensure that proposed actions are not merely part of a "wish list" but actually reflects institutional priorities?*

Yes ☐   No ☐

Q12 Linking planning and budgeting: *Is there a rigorous methodology in place to identify the costs associated with strategic priorities that are connected to revenue flows associated with a budgeting process?*

Yes ☐   No ☐

Q13 Measuring success: *Are the leaders, experts, and committee members willing and able to create objective metrics associated with its priorities and action items?*

Yes ☐   No ☐

Q14 Working the plan: Are the leaders committed to implementing the strategic plan such that is as an actionable, on-going process over its entire stated timeline?

Yes ☐   No ☐

Q15 Owning the plan: *Are there individuals assigned with the responsibility for the completion, or necessary adjustment, of the identified priorities and action items?*

Yes ☐   No ☐

Q16 Selling the plan: *Do leaders and owners look for opportunities to speak to the importance of the strategic plan throughout its implementation phase?*

Yes ☐   No ☐

Q17 Learning continuously: *Are there overt and robust reflective practices that both celebrate successes and embrace opportunities for continuous improvement in the planning cycle and used to inform the next planning cycle as well?*

Yes ☐   No ☐