Agile Strategic Planning Workbook

Use this checklist to guide your institution through the core components and implementation practices of an agile strategic planning process.

Future-Oriented Environmental Scanning

- [ ] Have we established a structured process for horizon scanning and trend analysis?
- [ ] Are we monitoring political, demographic, economic, and technological trends regularly?

Holistic Scenario-Based Thinking

- [ ] Have we developed multiple plausible future scenarios?
- [ ] Are we using scenarios to test resilience of current strategies and decisions?

Short-Horizon Execution Within Long-Horizon Strategy

- [ ] Are we executing priorities through rolling 6–18-month cycles?
- [ ] Are short-horizon priorities clearly aligned to long-term institutional goals?

Mission-Centered Flexibility

- [ ] Is our planning approach flexible enough to adjust strategies and tactics without compromising mission alignment?

Continuous Policy Monitoring and Strategic Responsiveness

- [ ] Do we have a dedicated process or team for monitoring policy shifts?
- [ ] Are we leveraging tools such as policy briefings or AI-based monitoring to inform strategic adjustments?

Integrated Risk Assessment

- [ ] Have we incorporated funding, policy, accreditation, and operational risks into our strategic risk model?
- [ ] Are risk thresholds and mitigation strategies clearly defined and actionable?

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Diversified Strategic Investments

- [ ] Have we analyzed our revenue dependencies and identified areas for diversification?
- [ ] Are we pursuing innovation in programs, partnerships, and alternative revenue models to strengthen financial resilience?

Distributed Governance and Stakeholder Engagement

- [ ] Are boards, faculty, staff, students, and external partners engaged across all stages of planning and execution?
- [ ] Does governance structure support ownership and accountability for adaptive planning?

Measurable Outcomes and Iteration

- [ ] Have we defined clear KPIs tied to our strategic priorities?
- [ ] Are feedback loops and regular review cycles in place to drive continuous learning and adaptation?

Implementing Adaptive Strategic Planning

- [ ] Have we conducted a Strategic Audit to identify planning gaps and institutional rigidities?
- [ ] Are we actively fostering a Culture That Can Pivot through leadership, transparency, and collaboration?
- [ ] Have we reworked Timelines and Accountability Models to support short-horizon execution?
- [ ] Are we Communicating Transparently with Stakeholders about planning progress and adjustments?
- [ ] Is our budgeting process aligned and flexible to support evolving strategic priorities?

Clarifying Adaptive Planning Horizons

- [ ] Have we adopted rolling 1–3-year operational priorities that align to our long-term mission?
- [ ] Are we continuously updating plans based on environmental scanning, performance data, and stakeholder input?

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