

Bonni [00:00:00] Today on episode 78 of Teaching in Higher Ed the power of checklists.

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Bonni [00:00:16] Welcome to this episode of Teaching in Higher Ed. This was a space where we explore the art and science of being more effective at facilitating learning. We also share ways to increase our personal productivity approaches so we can have more peace in our lives and be even more present for our students.

Bonni [00:00:45] I'm having one of those days. I guess I should say weeks ok maybe months where I want to change the end of that intro to not just say have more peace in our lives to be present for our students but also to be present for our families.

Bonni [00:00:59] I am closing out my semester and like many of you have that feeling of being overwhelmed and in my case not able to spend quite as much time as I would like with my family.

Bonni [00:01:12] But I'm happy to be checking in with you this week and sharing a bit about how I keep my head on somewhat straight for as the semester ends.

Bonni [00:01:22] But especially as I look to starting up a new one. We don't have that long of a break between our semesters especially when I think about we will be having family come visit between Christmas and just New Year's Day and that starts to make the schedule even fill even more so I like to be thinking ahead about that new semester.

Bonni [00:01:42] Even before some of my colleagues perhaps are and one of the things that comes to mind often I thought I would share with you today is the power of checklists. This started back when I read Atul Gawande's book The

Checklist Manifesto and I know I've shared about it before on the show but I have not devoted an entire episode to it before as I am today.

Bonni [00:02:07] I would call that book life changing and I don't say that lightly. But I say that in two ways really. First of all it's a very powerful read. It went into all of these areas that I'm not familiar with looking at checklists how they are saving lives in medical professions how they're saving lives.

Bonni [00:02:28] Sorry not saving lives but but building incredible architecture that has never been built before and I suppose you could say saving lives because there are so many safety checks in those kinds of processes. But all of these areas that are not that familiar to me. It was an incredibly powerful read.

Bonni [00:02:46] I read in a very short duration and it really has stayed with me for such a long time and it wasn't just powerful in terms of reading the true stories about other types of applications of checklists than maybe I'd ever imagined before but also because it had such a strong impact on me.

Bonni [00:03:07] All of these years later I can see that it has created meaningful change and stayed with me all this time it's amazing the retention that I have for it in terms of what I remember about what he wrote about checklists and then also that I have many checklists now that I use and find to be so helpful in my teaching and in my life a couple of quotes from his book he talks about good checklists. He says.

Bonni [00:03:35] "Good checklists. On the other hand" he is contrasting them to bad checklists. "They're precise they are efficient to the point and easy to use even in the most difficult situations. They do not try to spell out everything. For example a checklist cannot fly a plane. Instead they provide reminders of only the most critical and important steps. The ones that even the highly skilled professional using them could miss good checklists are above all practical."

Bonni [00:04:09] What's on my mind right now. Unfortunately this week we've had even more gun violence in our country and I've been reading a lot in the Chronicle of Higher Ed about concerns that faculty members have about violence on their campuses and I do occasionally think about that in my own classroom and in the back of the classroom is a red binder.

Bonni [00:04:32] And one of the things I remember about that red binder I watched an active shooter video training program before on my campus and

one of the things I remember is that there's a key in there that will lock the classroom door from the inside if you want to barricade yourself in there.

Bonni [00:04:48] And I'm embarrassed to say I don't remember much more about what's in there but but if God forbid anything were to happen that's the first place I'm going to grab the red notebook and to open it up and access the resources that are there because when we are in those emergency situations our brains - our amygdalas kind of take over.

Bonni [00:05:07] And we get into that fight or flight mode which is not the most sophisticated parts of our brains and we want to access a little bit more of someone's already thought through these things and provide the resources that we might need.

Bonni [00:05:21] Another quote from Atul - "We don't like checklists. They can be painstaking. They're not much fun but I don't think the issue here is merely laziness. There's something deeper more visceral going on when people walk away not only from saving lives but from making money it somehow feels beneath us to use a checklist an embarrassment that runs entered a deeply held beliefs about how the truly great among us those we aspire to be. Handle situations of high stakes and complexity the truly great are daring. They improvise. They don't have protocols and checklists may be our idea of heroism needs updating." It's a very powerful read.

Bonni [00:06:08] And again one that has stayed with me in all sorts of matters and not necessarily life or death matters the rest of my references will be all made to things that aren't going to save anyone's lives as so much of what he writes about in the book. I actually do like he talks about how checklists are saving lives in the medical profession.

Bonni [00:06:28] And I mean it's really powerful to read and just see the evidence that they have of that but the rest of the podcast today is going to be more on the practical front of things we can do in our own teaching and our own productivity as faculty members. Here's a couple of definitions that I want to clarify here.

Bonni [00:06:47] I want a contrast between a to do list and a checklist and I want to first share that. There certainly is no agreed upon definition between these two things and I'll share with you a couple of points of view from some people that are pretty big in this area and then I'll let you know how I distinguish between them.

Bonni [00:07:08] The website lessdoing.com clarifies that in their model a To Do list gives you what to do and a checklist gives you how to do it. An alpha efficiency dot com talks about a checklist being a documented process for something you'll do daily and a To Do list something you've assembled yourself that you'll need to do at a certain point of your day.

Bonni [00:07:36] The one that resonated with me most highly was not those two because I see them as perhaps the most important distinguishing features for me. I went to Quora the Web site that is all about really intelligent questions and really intelligent answers.

Bonni [00:07:54] And Philip Crawford a software entrepreneur writes the most at least currently as of today writes the most highly rated answer for distinguishing between what if any is the difference between a checklist and a to do list.

Bonni [00:08:10] And Philip talks about checklists being the code affixation of standardized processes and that definition really resonates with me because for me in my case I stretch a tool Gandhi's idea of a checklist.

Bonni [00:08:25] Because mine doesn't all take place on one day necessarily the ones that I do the most are going to take place over perhaps even a series of weeks but they don't necessarily fit as a to do list for me because they're going to happen time and time again as opposed to just a one off to do list like I might have in my to do list.

Bonni [00:08:48] And he talks about examples of common checklists for people just in business might have a new client checklist a new employee checklist surgery preparation checklist airplane takeoff checklist which that's a really common one daily store opening checklist and he says to notice that these are not to do lists.

Bonni [00:09:09] Their descriptions of standard business processes and then for people we might have going on a business trip checklist a campaign checklist a selling my car check list etc. Their standard steps. We don't want to forget.

Bonni [00:09:23] He distinguishes checklists with to do lists because he says to do lists are ephemeral and ad hoc in nature. Once an item is done it's gone to do lists are not standardized processes.

Bonni [00:09:39] When you use a checklist that can be calm and will look and act like a to do list and in my case they all do. They just fit right in with my normal to do list but again they're repetitive. They're going to look about the same every time I use them unless I go back and modify them in some way.

Bonni [00:09:56] Natalie Houston who's been on this show before and she's a great writer for The Chronicle among other places and an English professor and English chair and she wrote an article for The Chronicle about why checklists work which I'll be linking to in the show notes by the way including everything else I'm talking about at teachinginhighered.com/78.

Bonni [00:10:21] And the definition that she gives is in one case checklists can ensure communication and confirmation among members of a team and can catch errors.

Bonni [00:10:32] In my case most of the checklists that I use on a semester by semester basis are mostly just to make sure that I don't make mistakes but in some cases I have dependencies on other people that I may need to make sure happen to make sure that this semester kicks off the way that it should and Natalie clarifies.

Bonni [00:10:50] There are two kinds of checklists. One is a read do check list and in this case we read each step and perform the step and checking it off as you go. Those are most of my checklists and it's like following a recipe as you go down and complete each step.

Bonni [00:11:07] The second kind of checklist is a do confirm checklist. You perform the steps of the tasks from memory until you reach a defined pause point when you confirm that certain things have happened.

Bonni [00:11:21] Well when it comes to how many items should be on a checklist before each pause point in the process. Gawande recommends no more than 10 items. Other experts recommend between 5 and 7.

Bonni [00:11:36] I will tell you on my checklist a lot of them are exceeding these recommended values. But he distinguishes the idea that we'll have these Pause points in the process and I might be able to improve mine. If I were to have if I thought more about where the pause points could come in the process.

Bonni [00:11:55] Atul Gawande has a checklist for checklists and he has three categories that he looks at when you're developing the checklist when you're

drafting it and then when you're validating it to make sure that it works and I'll be linking to that in the show notes I'm not going to cover every item that he has and I'm also going to say that his checklist for checklists.

Bonni [00:12:17] Again mine may not all be designed the way that he recommends but I like having this here just in thinking how I might make them better over time under the development he says. Do you have clear concise objectives for your checklist.

Bonni [00:12:36] And he says have you considered adding items that will improve communication among team members involving all members of the team in the checklist creation process. So if you're using the idea of checklists and you're working with teams those are a couple of really good things to do.

Bonni [00:12:53] And then in the actual crafting of the checklist he asks is the font sans serif. If you're not familiar with sans serif it means without serif and serifs are the little curly cues that are on the end of letters like if you picture a lowercase t in many fonts the bottom part of the T is curly and off to the right hand side. What the Saraph fonts do for us is they allow our eyes to track much more quickly across the page.

Bonni [00:13:23] So if you're reading the newspaper or you're reading a great web font that is intended for reading paragraphs of text. The Saraph fonts are going to have our eyes tracking right across it so he's asking in this checklist for checklists is the font on your checklist sans serif.

Bonni [00:13:41] Is without the little curly Q So whatever font we have is going to slow our eyes down and make sure that we read more carefully than we might otherwise.

Bonni [00:13:51] That's just one example of what he has in the drafting portion of his checklist on checklists and then lastly for validation he says have you trip trial to the check list with front line users either in a real or simulated situation.

Bonni [00:14:08] And then have you modified the checklist in response to repeated trials and I modify my checklists all the time and they just keep getting better and better as I find more ways to streamline things in the process.

Bonni [00:14:24] Natalie Houston also talks about some advice on making our checklists most usable she says we should keep it simple. That one may be

obvious but it certainly is one of those things that when you're working through steps the more simple it is the easier it will be to follow.

Bonni [00:14:41] And especially some of the checklists that I have are things when I'm on board if you will a teaching assistant. I have a checklist for that and if I want to try to delegate some of that checklist were they self teach themselves certain things and then they check off parts of the checklist. I have.

Bonni [00:15:01] As ridiculous as this may sound I have a video that shows them how to use the scantron machine. It's not that hard to use but I don't want to teach a teacher to do that every single semester. If a video will do the trick.

Bonni [00:15:15] And so they can check off that they've watched it and that they have tried it out and that they understand how to use it. That will make that first exam that much easier when there's 100 or 200 to run through and I can just send them off on their own and I don't have to go over and show them how to do it.

Bonni [00:15:32] And then the second piece of advice that she gives is to make it usable. And again she says this might be obvious but you want to whatever checklist you develop you need to be able to check things off. If you're a person that likes to have it on paper then it should be something that you print out and has the little boxes for checking off.

Bonni [00:15:50] In my case you probably could predict I'm more on the electronic end of things I used to keep it in Evernote and Evernote does have a checklist little checkboxes available inside of it but now I keep my checklist inside of omni focus which is my task manager and I use a project template that Curt Clifton developed where it'll create a copy of one of my projects in this case.

Bonni [00:16:17] It's a check list and it'll populate it with variable content so it'll say what semester is it going to be. What class is it going to be so that each little part of the checklist shows up that way. As I said I'm getting ready for the Spring 2016 semester.

Bonni [00:16:40] So I have a checklist called PrEP semester semester and the semester is in brackets and using Curt Clifton's script I can have it where it just pops up and ask me what semester it's going to be in that case. 2016 s for spring.

Bonni [00:16:58] And then it'll copy the template and it'll include that variable in their 2016 Spring. And everything else will come over just some of the items on that checklist are to create a weekly schedule with office hours to email that schedule to the person in our department who needs to receive it.

Bonni [00:17:20] Set up that semester in plan book which is my class planning software of choice and then that's actually a big category that has some sub tasks to it like create a new file set us a weekly template setup meeting times for all classes set up the major holidays that's all under setting up the semester in my plan books software.

Bonni [00:17:42] I also have a more macro category called update the university's Web site and it has to update the semester course list because Iowa's list the courses I'm teaching that come coming semester and then update the textbook lists because there's always the information about what textbooks are needed for the classes I'll be teaching up there as well.

Bonni [00:18:04] And that's just an example of prepping the semester. I also have prepping the academic year that's a much shorter checklist at present. It has to revise my CV and to review conference possibilities for that academic year and then lastly around class planning. I have a prep class semester so specific down to the class level and that for that coming semester.

Bonni [00:18:31] And it talks about creating the class or I should say customizing the class shell within our learning management system to revise or review but learning outcomes do the same thing with assignments too as we get closer to the semester printing class rosters slash in sheets etc.

Bonni [00:18:53] And that's just an example of some of the items on that checklist as well. I have a class checklist that I will be sharing with you in the show notes at teachinginhighered.com/78 if you would like to get an example of how I go about doing this although the one that you're looking at is the one in Evernote and I will say I've continued to refine it even more inside of my omnifocus task manager.

Bonni [00:19:22] I hope that you are able to put some of these practices in place regarding using checklists in your teaching and your productivity. I would love to hear from you.

Bonni [00:19:32] If you're making use of some of these checklists already or if you start to use them hearing this episode you always know I get so rewarded by

knowing that this is a good resource to help you implement some of these things as well.

Bonni [00:19:46] This is the point in the show where we do recommendations and it shouldn't surprise you that I'm going to be recommending the book *The Checklist Manifesto* today. It is a fabulous read. It would be a great one for you to read over any holiday break that you have between two semesters. And it's a quick one. Like I said and really is likely to stick with you really well.

Bonni [00:20:09] And the second thing I'll be recommending is a new Web tool that I've heard about for a while but really just figured out a good use case for it. And it's called Trello and Trello is actually how some people manage their tasks.

Bonni [00:20:25] It is more of a visual task planning system than other systems that you might see or be familiar with. I don't necessarily use it for tasks but I started using it for podcast guests or potential podcast guests and how it is built as it's built around stacks of cards. And you have lists.

Bonni [00:20:47] And I'll give the example of what I created for podcast guests. I hear a lot of times about who might be a great guest for a podcast or I hear about a great topic and on Trello I now have a stack of cards called actually I have a board they called a board. You almost might think about that as a corkboard.

Bonni [00:21:11] So I have a board now called potential guests and then I have under that different cards for people I'm considering inviting. I used to track this and Evernote.

Bonni [00:21:24] In fact I haven't converted everything over yet into the Trello system I was still experimenting to make sure that it's going to work for me.

Bonni [00:21:32] But right now I have someone who's a faculty developer that one of our recent guests said was who he considered to be the best faculty developer out there. And so of course my ears perked up and I put his name down as a potential guest and looked up his contact information and was able to include that.

Bonni [00:21:50] So again there's different cards within the potential guests and they're all able to be there. And when you click and open up a card you can have web links you can have comments there's an activity listing at the bottom

that shares everything that's changed in. And since I guess since you created the card you can add other members to join in and collaborate on this card.

Bonni [00:22:14] You can have labels you can have checklists you can see why I brought it up. You can assign a due date to it and any attachments that you want to include on the card as well.

Bonni [00:22:24] So a lot of power within each individual card that you might put inside of Trello. And then I can just drag a potential guest over to my next stack of cards and in this case these are people that I have sent invites to but I'm waiting for a reply from I use to track this in my omnifocus list.

Bonni [00:22:48] So I would send out an invite and then say I was waiting for a reply for so and so but it's really not efficient for me to do that because I do send out quite a few invites all at once and someone may get back to me that afternoon.

Bonni [00:23:02] I'm really surprised actually how many people get back really quick but other people it may take a week or two. It's much more efficient for me to have them sitting here inside of Trello I know where everything's being tracked.

Bonni [00:23:13] And then as soon as I actually get either a yes from them or I know from them I can drag them over to booked guests and then I can actually drive them all the way over to a red. Guess this is just one example of how Trello works.

Bonni [00:23:31] My husband has a similar workflow that he is doing for writing. Essentially what he's doing is writing some case studies. And so he has the potential people he's going to write the case studies on.

Bonni [00:23:43] And then as they go through get the photograph as he goes through each step he can move the cards over and keep track of it that way. You can also put images in there. And again a lot more visual that way. That encourage you to check out Trello and see what it might be able to do for you.

Bonni [00:24:03] That's it for this episode of Teaching in Higher Ed. If you have any comments on the episode or ways that you're using checklists and you're teaching.

Bonni [00:24:11] I would love to hear from you at teachinginhighered.com/78. And recently I've been talking to people they don't necessarily know that we have a facebook group but we do it said Facebook.com/teachinginhighered.

Bonni [00:24:28] And would love to expand our dialogue over there so we can get more interaction happening with the community. So feel free to check us out over there.

Bonni [00:24:36] And as always if you have yet to write a review or give a rating to the show and whatever service it is that you listen to it it really helps others just discover the show and us to move up on the rankings and then people can find out about Teaching in Higher Ed and engage in the conversation. Thanks so much for listening and I'll see you next time.

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