



## Visioning and Planning Proposal

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As the term implies, visioning and planning engages stakeholder reflection about organizational direction and progress. In essence, it is a process of assessing and advancing the mission of the organization. Visioning and planning done well also assumes sustainable organizational development.

### Basic Tenants of Planning

1. Planning should not mess up a good idea.
2. Planning should inform the budget, not vice versa.
3. Planning must not be an “add-on” to everything else the organization is doing, it MUST be fully integrated into current systems and processes, and committees as much as possible.
4. Planning must focus on data driven decision making; no data, no decision.
5. Planning must be sustainable within the capacity of the organization.

### FOUR Integrated Stages of Implementation

**1) Recommended Stage One: System Orientation spring-summer 2020--\$5,000** This stage engages initial dialogue about the nature of visioning and planning and its value and application to the organization.

- a) Introduce and discuss the planning process to the school district leadership team
- b) Determine the delegation of and internal facilitation needed
- c) Determine the data base that will inform planning
- d) Communicate the rationale for, and anticipated products of, planning and overview planning structure and process
- e) Forecast requirements of sustainable organizational planning
- f) Assess readiness for, and commitment to, planning
- g) Establish a planning schedule

- 2) **Recommended Stage Two: Systems Planning summer-fall, 2020--\$8,000** To advance the mission of the organization, the planning process addresses clarification of purpose, assessment of status, focusing of priorities, alignment of strategy and action, and monitoring of progress. Five questions structure a very focused and interactive conversation between stakeholders.
- a) Who are we? (*Core values? Defining qualities? Reason for being? Compelling purpose?*)
  - b) Where are we? (*Environmental developments? Strengths and weaknesses? Threats and opportunities?*)
  - c) Where are we going? (*Vision? Goals? Direction?*)
  - d) How will we get there? (*Strategies? Draft Actions?*)
  - e) How will we know we are there? (*Assessment? Monitoring? Reporting?*)

Following the planning retreat, a Visioning and Planning document is drafted and presented for review and editing by retreat participants and other stakeholders. *The plan document is the initial planning product, and document content reflects the planning process.*

**C. Stage Three: System Action and Implementation, fall 2020 and spring 2021, cost TBD based on determined needs.**

Visioning and planning is initiated by the drafting of a guiding plan, but that foundation in turn is a base for ongoing strategic thinking and action. Specifically, the third stage of the planning process focuses on and specifically delineates how goal achievement strategies will be acted on and assessed by results data (i.e., how we will get there and how we will know we are there). This stage focuses on action, data, and implementation.

**D. Stage Four: System Plan Updates in 2021 Cost TBD based on determined needs**

The fourth stage of the visioning and planning process monitors and adjusts the system plan in response to assessment of action plan results and overall goal progress (e.g., through annual or semi-annual plan updates). This stage focuses on assessment, analysis, and refinement.

## Who We Are

**Dr. Peter Jonas** is a full professor at Cardinal Stritch University. He has written [five books in support of my research \(but only the books on humor are any good\): \*Secrets of Connecting Leadership and Learning to Humor\* \(2004\); \*Laughing and Learning: An Alternative to Shut-up and Listen\* \(2009\); \*Outcomes Assessment in Higher Education Linked with Strategic Planning and Budgeting\* \[2<sup>nd</sup> ed.\] \(2013\); \*Soccer is Fun without Parents\* \(2019\); and \*Transforming Learning: Don't Let School interfere with your Laughing\* \(2019\).](#)

Peter has more than 30 years teaching research, statistics, and leadership. He has a keen interest in technology and has made more than 100 presentations across the country and working with organizations to develop skills across a broad variety of topics.

In addition, Peter has also been actively involved in consulting and writing; authoring more than 40 books, manuals, and articles in professional periodicals. Peter is also a peer reviewer for the Higher Learning Commission. He has served as the Dean of the College of Business and Management, Director of Institutional Research and worked on more than 50 different grant projects. Ultimately, Peter attempts to integrate teaching, scholarship, service, and humor into his leadership philosophy.

**Dr. Nancy Stanford Blair** is Professor Emerita of Leadership Studies at Cardinal Stritch University in Milwaukee, Wisconsin. A former teacher and school administrator, Nancy currently consults in the areas of leadership formation, effectiveness and sustainability, organizational development and culture building, and the creation of learning organizations. She has taught at the Master and Doctoral level and consults locally, nationally and internationally with schools, non-profits and business. Nancy has co-authored several books on leadership: *Connecting Leadership to the Brain*, and *Leading with The Brain in Mind*, and *Mindful Leadership* published by Corwin Press and *Leading Coherently: Reflections from Leaders Around the World* published by Sage.

Nancy's research interests lie in the area of leadership formation, sustainability and coherent leadership behavior that aligns core values, high impact performance and capacity building in others.

Nancy currently is focusing her leadership study and teaching in the area of transformational leadership, for self and systems. She has circled the globe to learn from a diverse array of over 100 servant leaders from the United States, Africa, India and Europe to discover lessons they have to teach about their transformation to extraordinary leaders who serve. Her latest book is titled *Your Life is Your Message: Discovering the Core of Transformational Leadership*.