Our 3-Part Discussion Series: Visioning Onward: A Guide for All Schools

LEADER'S GUIDE

- **Module I**: Why Visioning Matters and How to Introduce it in Schools
  Visioning Amid COVID-19
- **Module II**: Our 8-Step Visioning Process
  (Starting with Steps 1-4)
- **Module III**: Implementing Steps 3 & 4
- **Module IV**: Creative Considerations for Visioning
- **Module V**: Implementing Step 5
- **Module VI**: Steps 6-8 of the Visioning Process
  - Mission and Goal Setting
  - Barriers and Sustainability and the Future of Visioning

With this guide, school leaders can implement recommendations from our guided discussion series in their own schools and districts.

Virtual learning participants will also receive accompanying slide decks and have access to our videos to use in their schools and communities.

---

1Copyright © 2020. Center for Educational Improvement, Vienna VA. Permission granted to use with the New England Mental Health Technology Transfer Center funded by SAMHSA and for educators who are enrolled in Visioning Onward virtual learning or other Visioning Onward workshops. For educational use by others contact Christine Mason (chrismason@edimprovement.org). Based on the text by Mason, Liabenow, & Patschke (2020). Visioning Onward. Corwin Press.
Visioning: Our 8-step Iterative Process

Step 1: Form a Vision Steering Team

Step 2: Determine who will be involved in visioning

Step 3: Develop your first draft of your vision

Step 4: Research exemplars and options

Step 5: Refine your vision using an iterative visioning

Step 6: Develop your mission and goal statements and determine how to measure progress process

Step 7: Secure consensus

Step 8: Develop an Action Plan to implement your vision

Note: View archived webinars and slide presentations from Sessions 1 and 2 of our Visioning Onward Guided Discussion Series with Christine Mason, Paul Liabenow, and Melissa Patschke.
Considerations for Visioning

- Remember to include key stakeholders.
- Use an iterative process.
- Consider the Context.
- Make it idealistic, yet practical (see Circle of Ideas on p. 77, Figure 4.1, *Visioning Onward*).

Module V: Implementing Step 5 (Refining Your Vision)

*Visioning Onward, Chapters 5 and 6*

Visioning from a mindfulness perspective. During the current pandemic and with increased racial tensions and concern for equity and justice at this moment in history, it is particularly important to be mindful—to be aware of the current needs and concerns. Mindfulness can be enhanced by a sense of calm. Activities such as yoga, mindful breathing, and meditation can help prepare you, your staff, and your visioning team.

- What do you know about mindfulness?
- Do you have a mindfulness practice?
- Could you have someone lead a mindfulness session as you begin your teamwork on visioning?

Consider the needs and well-being of children who are most at risk of trauma. Here is a framework used by the New England Mental Health Technology Transfer Center (New England MHTTC) and our Childhood-Trauma Learning Collaborative (C-TLC):

**Compassionate School Mental Health Model**

(Mason, Asby, Wenzel, Volk, & Staeheli, in press)
Examine each of the quadrants and consider during the current pandemic what you are doing and what more you could be doing to provide an environment that leads to improved protective factors and greater resiliency.

See our companion books on mindful practices and mindful school communities:

**Mindfulness Practices: Cultivating Heart Centered Learning where Students Focus and Flourish**  
Mason, C., Rivers Murphy, M, & Jackson, Y. (2019)

**Mindful School Communities: The Five Cs of Nurturing Heart Centered Learning**  
Mason, C., Rivers Murphy, M, & Jackson, Y. (2020)

**Visioning for Self-Care**

During times of crisis, visioning for self-care is particularly important.

- Are you currently encouraging self-care with your students and staff?

- If not, how could you insert self-care into routines for your school?

Consider:

- Mindfulness, yoga, and breathing activities
- Physical exercise – aerobics, weightlifting, walking/running, biking
- Nutritious eating
- Suggestions for taking time for self
- Recommendations for balancing our lives

- How does your vision statement address self-care?

**Optimism:** In Sessions 1 and 2, we discussed the importance of balancing idealism with pragmatism (see Circle of Ideas from p. 77, *Visioning Onward*). We also shared ideas from international thought leaders. You may want to review slides and archived materials from these sessions to consider again some of the ways that international leaders are seeing opportunity during this time of crisis. By reviewing concepts for improving the world, uplifting others, providing greater support to families, and also examining educational trends such as innovations in technology, you will be better prepared to lead others in visioning. Also, taking time to reflect on the successes you and other schools and districts have achieved during the past few months can help ground you in a realistic understanding of what is possible and how you are prepared/are preparing for school opening next fall.
Macro and Micro Elements
• Adaptive and Transformational Leadership

Drama → Situation ← Choice ← Opportunity

We live in a time that calls us to claim responsibility for our lives and the creation of a world in ways never witnessed before.

Alan Searle, Create a World that Works
(2011, p. xviii)

Ideas on Optimism: Chapters 7, 8, and 9
Visioning Onward

Summarize visioning actions you have taken. Please check items you have completed:

(Steps 1, 2, and 4)

☐ Informal discussions with others about visions for Fall 2020

☐ Created a Vision Steering Team

☐ Held initial meetings of the Vision Steering Team

☐ Identified and researched exemplars
  See suggestions from Sessions 1-3 Visioning Onward Guided Discussion Series

Module V: Implementing Step 5
Module VI: Steps 6-8 of the Visioning Process
Researching Exemplars

<table>
<thead>
<tr>
<th>Innovative Approach/School</th>
<th>Description/Link for More Info</th>
<th>What Is Unique and Appealing?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Because of our current pandemic, we are recommending that educational leaders initiate Step 4 (Researching Exemplars) as you begin Step 3 (Completing a first draft of your vision).

Please review the steps you have undertaken to date and record any thoughts about what you have learned and what else you may need to consider.

- Have you uncovered any additional exemplars or completed any additional investigation to learn more about exemplars that are compelling?
- Consider both macro and micro exemplars (see Session 2 presentation materials).
Assessing Your Baseline: Visit www.s-ccate.org and review the background information and sample questions for S-CCATE (the School-Compassionate Culture Analytical Tool for Educators).

This brief assessment can be completed in 12-15 minutes and is a self-reporting tool that educators can use to examine how their schools/districts are engaged in activities that support a compassionate school environment. Our online assessment uses a four-point Likert scale. Respondents obtain aggregated results and recommendations for actions to improve the school culture in areas of greatest need.

The S-CCATE assesses five aspects of school culture from a trauma-informed lens of compassion. Through the New England MHTTC, S-CCATE is available at no-charge for schools and districts in New England.

For more information, contact us at chris.mason@edimprovement.org.

Step 3: Develop the first draft of your vision statement.

Some of you may have already completed a draft of your vision statement. If so, please insert it below:

Remember that the vision statement should:

- Be written in the present tense
- Be inspirational
- Create a vivid picture
- Evoke emotion

If you have not yet drafted a vision statement, develop a preliminary draft above and use it for the following exercise: When will you engage in Visioning Steps 1, 2, and 3 (forming a visioning steering team and blueprint, considering stakeholders for your larger visioning process, and developing your initial draft)?
Step 5: The Iterative Visioning Process

Compare your vision statement with others':

- Highlight or make notes on concepts from the following examples that might be useful to you.

- What stands out as an important consideration for your school or district?

NOTES

From Visioning Session 2

VISIONS RELEVANT FOR THE FUTURE OF EDUCATION IN LIGHT OF OUR CURRENT PANDEMIC

Example 1
Our school is a foundational support to families and children, embedding compassion, self-care, equity and justice; alleviating trauma; and promoting cognition and academic learning. Safety is foremost as we connect in classrooms and virtually, with advanced technologies and innovations to meet the needs of each student in ways that are developmentally appropriate, that advance student metacognition, lead to resiliency, and are sensitive to ongoing global concerns.

Example 2 (Note: This example is a vision for education in general.)
Education has a vital role to play in developing the knowledge, skills, attitudes and values that enable people to contribute to and benefit from an inclusive and sustainable future.

To navigate [in the future], students will need to develop curiosity, imagination, resilience and self-regulation... they will need to cope with failure and rejection and move forward in the face of adversity... they will also need to care about the well-being of their friends and families, their communities and the planet.

Education can equip learners with agency and a sense of purpose, and the competencies they need, to shape their own lives and contribute to the lives of others. [Education should be] committed to helping every learner develop as a whole person, fulfil his or her potential, and help shape a shared future built on the well-being of individuals, communities, and the planet.

Example 3 From Ivan Sellers, *Soul of Education*
(Note: This example is for an organization.)
The Soul of Education is a global collaboration and network, bringing together educational experts, scholars, policy makers, researchers, innovators and activists from diverse countries and cultures—to share, explore, and redefine the essential core and purpose of education.

At the core of the initiative is an invitation to envision a more holistic and humanistic integrative education paradigm, and to realize the culture, practices and implementations needed to help create a more responsible, connected, sustainable, and ethically based society.

MORE TRADITIONAL VISIONS

Example 4
The vision for Washington County Public Schools (n.d.) in Hagerstown, Maryland: “Washington County Public Schools, in partnership with community members, educates and enables all students to fully access opportunities afforded them in a rapidly changing, diverse, global society.”

Their website indicates that through magnet and advanced programs, technical specialties, outdoor experiences, special education, technology and the arts, WCPS prepares students for chosen college or career paths after education. Innovative leadership and programming create an educational experience to ensure that students have the opportunity to succeed in a 21st Century environment.

Example 5
Upper Providence Elementary School (Royersford, PA): UPE is an engaging environment where everyone is acknowledged, valued, and matters. We support the whole child and the ‘team sport’ of teaching & learning. We care. We laugh. We collectively believe in the life-changing power of our school community.

Record any potential revisions to your Vision Statement.

Sample Mission Statement (from p. 73, Visioning Onward)

Mission Statement for Rainbow Community School, Asheville NC

Our mission is to develop accomplished, confident, and creative learners who are prepared to be compassionate leaders in building a socially just, spiritually connected, and environmentally sustainable world.

Background Information: As Dr. Renee Owen, the executive director since 2007, explains, “We inspire academic excellence with a program in harmony with the stages of child development. We model within our community the kind of world in which we aspire to live.” The Rainbow Community School’s (n.d.) website provides additional information on its holistic approach:

Holistic Education follows this same premise [that life is an interaction of wholes rather than a collection of individual parts], subscribing to the philosophy that the learning experience is a comprehensive integration not only of traditional academic subjects, but of the many facets that comprise a human being. The reductionist view that humans are simply a mind/body construct—a machine with parts that can be modified in isolation—does not fulfill the learner’s true potential.

Indeed, humans are far more intricate, subtle and mysterious beings. We are multifaceted creatures with a range of complex emotions, deep connections to the natural world, seekers of the mystery, with an innate need to create, to share, to understand, & to be understood. It is the Holistic view that recognizes this concept and the Holistic Education model that seeks its implementation—for the enrichment of the “whole” learner. Yet, before we can truly nurture the “whole” learner, we must define those individual facets, much in the way that a prism defines white light into seven bands of color. At Rainbow Community School (RCS), the student is viewed Holistically through Seven Domains: spiritual, mental, social, emotional, creative, natural, and physical. The purpose of this education model is to develop the whole learner.
Mission statements are brief, typically one sentence statements that define the fundamental purpose of the organization. Mission statements are the “guiding force” for decision making and are useful for marketing both inside and outside the school, they tell both families and staff why the school exists, the school’s purpose, and what the school intends to achieve. (Visioning Onward, p. 121).

Criteria for Mission Statements (Stein, 2016)

- Short, concise, and to the point
- Meaningful to all stakeholders
- Realistic and implementable
- Measurable


Measuring Progress: How will you measure progress?

Step 7: Secure Consensus

- Consider who might not know of the new vision and make plans for communication (on the web, eNewsletters, paper announcements, town hall style meetings).

- Consider those who might have a different vision.
  - Informal meetings are sometimes helpful.

- Make getting consensus an ongoing activity; some people may be early adopters and ready to act on the new vision statement. Others may come on board later after they observe the impact.

- Adjust visions if needed, although often the adjustments can easily be made in the goals and action plans (Step 8) to accommodate diverse perspectives that may fall under a larger umbrella.
Step 8 Action Planning

1. Work backwards from your goals and mission statement to determine steps.
2. Break down steps to be as simple and actionable as possible.
3. Determine who is responsible for each action step.
4. Indicate what is to be achieved and propose deadlines.
5. Share information among your group so all are aware of who is responsible for what.
6. Check-in regularly to review progress/effectiveness of plan.

As you review progress, you may uncover ways to improve your plan; plan on adjusting your plan.

Review ➔ Evaluate ➔ Revise

Barriers, Sustainability, and Global Trends

As you complete your visioning process, consider barriers, sustainability, and global trends (see Chapters 7 and 8 of Visioning Onward). Some of this involves visioning at the macro level.

See the notes section of archived presentations from Sessions 2 and 3 of our Visioning Onward Guided Discussion Series.

What do you believe will be the greatest barriers to implementation of your vision?

What have you incorporated into your visioning process that should facilitate sustainability?
Addressing Barriers and Sustainability

Ways to Address Barriers and Sustainability

How to Infuse in School Culture

- Make your vision visible.
- Set aside time for team planning.
- Use website and social media.
- Provide professional development.
- Conduct a special event.
- Invite local newspapers and TV.
- Monitor progress and problem solving.
- Leverage resources.

Examine the list above. Identify 3 strategies that you will implement:

1. 
2. 
3. 

Global Trends

Change Drivers are affecting our planet. Some of these include:

- Automating choices
- Technological innovations
- Civic superpowers
- Accelerating brains (applying neuroscience; considering executive functioning)
- Toxic narratives (stress, the future of employment)
- Remaking geographies (immigration, climate change, economics)
- Social emotional and Heart Centered Learning (alleviating stress/building compassion, protective factors, and resiliency)
- Global pandemics and crisis
- A stand for racial equity and justice

How are these impacting your school/district?  
(see Chapter 8 of Visioning Onward)
How do you envision these practices will impact your school/district in the future?

As you complete this module on Visioning Onward, is there anything from these change drivers that you might want to share with your community as you finalize your visioning development and implementation process?

Consider Ivan Sellers’ Soul of Education Initiative. Is there anything from this initiative that you will be able to support with your vision?

Ivan Sellers: Soul of Education Initiative – A Vision Statement

a global collaboration and network, bringing together educational experts, scholars, policymakers, researchers, innovators, and activists from diverse countries and cultures—to share, explore, and redefine the essential core and purposes of education.

At the core of the initiative is an invitation to envision a more holistic and humanistic integrative education paradigm, and to realize the culture, practices, and implementations needed to help create a more responsible, connected, sustainable, and ethically based society.

You have now completed our Visioning Onward modules. Best wishes for your visioning process and for your future.

If we can further support your visioning journey, contact our session leader Dr. Christine Mason at chrismason@edimprovement.org.

Join us and share news of our National Visioning Discussion: Monday, June 22 at 4:00 p.m.
Visioning for the Future of Education: Back to School after COVID-19 – Supporting Student and Staff Mental Health