

ADVISORY

VISIONING DAY PLANNING by Christina Drouin

Here are some essential elements for planning a successful Visioning Day for your campus community.

Pre-Registration Packet

- Welcome and thank you letter from Head of School
- Draft Agenda
- Strategic Planning Flow Chart
- Definition of Planning Terms
- Readings
- Data
- Strategic Issues
- Core Values
- Mission Statement

Visioning Day Handouts

- Final Agenda
- Participant Workbook with Exercise Instructions
- Nametags
- Group assignments

Visioning Day Project Planning Teams

Program Coordinator

- Finalize agenda
- Gathers and prepares a set of originals of both Pre-Registration Packet and Visioning Day handouts (final agenda and Participant Notebook)
- Welcomes people on Visioning Day

Logistics Coordinators

- Room set-up and break down including registration area, main room, breakout rooms and refreshment area
- Signage
- AV needs

Registration and Volunteer Coordinators

- Collect pre-registrations
- Assign groups (with head of school)
- Prepare nametags
- Buy or obtain supplies (easels, markers, tape, pencils, paper, dots)
- Staff or find volunteer staff for the registration table
- Welcome people on Visioning Day

Food Coordinators

- Decide on refreshments for breakfast and lunch
- Organize
- Serve
- Clean up

Promotion, Publicity, Publications Coordinators

- Identifies when, where and how the Visioning Day will be promoted
- Serves as key spokesperson and ambassador for the event
- Copies, stuffs and mails the Pre-registration Packets
- Copies the Participant Notebooks



Visioning Day Punch List and Countdown

This is not an exhaustive list, but it offers suggested guidelines of what can be done to prepare for a successful Visioning Day.

Two months in advance

1. Convene Visioning Day Task Force to help with communications, logistics, and planning
2. Develop and mail a “Save the date card”
3. Draft Visioning Day agenda
4. Develop invitation list

4-6 weeks in advance

1. Letter of invitation to campus community, stakeholders, and other constituents with draft agenda with deadline for registration one week prior to Visioning Day
2. Choose campus location for Visioning Day (space for 100 people plus break-out areas)
3. Plan food (continental breakfast, lunch, snacks, beverages)
4. Promote Visioning Day and build excitement about the ‘visioning day’ on website and in written communications; talk it up with Board, faculty/staff, parents, students, and other constituents.

2-3 weeks in advance

1. Prepare registration packets (pocket folder with core values, mission, strategic issues, readings, agenda, thank you for registering letter, schematic of planning process and process terms)
2. Mail pre-registration packets as people pre-register
3. Order food
4. Order supplies (markers, self-stick easel pads, ¾ inch adhesive colored dots for voting, paper, pencils)
5. Plan and create signage (outside/inside, including a group number where groups will post work at plenary sessions)
6. Assign jobs for Visioning Day
7. Promote Visioning as a day of ‘visioning the future’ in meetings, presentations, written and electronic communications
8. Locate a nearby dedicated space for “Vision Central” (or another more suitable name) which is where the Strategic Planning Team will congregate and manage the logistics and outputs of the day, get and take direction, deal with issues and problems.

1 week and countdown

1. Create small groups for vision day exercises from names of people who have pre-registered
2. Call prospective participants who did not register to encourage attendance
3. Copy Participant Workbook
4. Prepare name tags for all participants and specially designated ones for Strategic Planning Team members
5. Secure A/V needs
6. Prepare remarks (Board chair, school head, and any other introductory or closing speaker according to the agenda)



24 hours in advance and Visioning Day

1. Set up room(s) including AV
2. Set up registration table (final roster, name tags, final agenda, any pertinent readings)
3. Post signs
4. Equip “Vision Central” (computer, printer, tables, chairs, coffee, food, wall space)
5. Set up food
6. Conduct pre-Visioning Day meeting with Strategic Planning Team members in Vision Central to finalize last minute details
7. Welcome participants
8. Start and end on time!

