



Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide

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In order to involve your employees in creating a vision for your practice, it is recommended that you hold a staff meeting. In the final module of this course, *Present to Your Staff*, a staff video has been provided that can be played to walk you and your team through all of the steps needed to create a collaborative vision for your practice. This *Team Meeting Facilitator Guide* is designed to walk you through the steps you need to take before, during, and after this meeting to facilitate it effectively.

Below is an outline of the content you'll find in this guide.

2-4

Steps you can take **before the meeting** to prepare yourself and your employees

5-6

Steps you can take **during the meeting** to facilitate it effectively

7-21

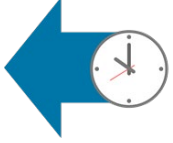
An outline of the activities you and your staff will be asked to do in the staff video and instructions for facilitation

22-24

Steps you can take **after the meeting** to create your collaborative vision and help your employees maintain momentum for implementing this vision

Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide



Before the Meeting

- 1. Understand your role as the facilitator.** As the facilitator, your job is to help your employees figure out the answers rather than giving them the answers. To do this, follow the tips below.

Keep the conversation on track. If the conversation gets off topic, get back on track by saying things like:

- That's a good point. Can you elaborate?
- That's a valid observation. How does it relate to our questions?
- Tell me more about your thoughts on that.
- What are some other thoughts on this question?
- I know we want to quickly solve issues sometimes. I do too. But let's explore these questions fully before we try to fix things so that we're working on the right things together and everyone is involved.

Talk less and listen more. The less you talk, the more people will engage and share.

Manage participation. In order to create a collaborative vision, everyone has to participate in all of the activities. This means you may need to draw quieter employees out and make sure the talkative employees are not the only ones contributing.

Provide clarity when needed. Use this facilitator guide to help lead the activities and answer questions throughout the staff meeting.

- 2. Pick a place and time for your meeting.** Choose a meeting space that is large enough to fit all of your employees and has technology capabilities to show the staff video. Also, be sure you've set aside at least three hours for the meeting.

Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide

- 3. Invite your employees to the meeting.** Invite employees by sending an email and posting the invitation in a common area (breakroom, refrigerator, etc.). You can use the sample email below or create your own.



You are invited to attend an all-staff meeting on **[Month, Day, Year]** from **[Time-Time]**. The goal of this meeting is to create a collaborative team vision of our ideal practice and how we will work together to achieve this vision. This is an excellent opportunity for each of you to be involved in shaping the future of our team and our practice. In order for this meeting to be successful, it is important for all team members to be present and engaged.

To prepare for the meeting, think about the following questions:

- How will a collaborative vision help you, our team, and our practice?
- What are some of the ways you would describe a veterinary practice that was at its very best?

Please bring a pen and paper to take notes and be prepared to participate in interactive discussion.

- 4. Prepare yourself for the meeting.** It is recommended that you watch the final module of this course prior to facilitating the meeting. This module contains the staff video and outlines the steps and activities that your team will complete to create a collaborative vision. Watching the video ahead of time will help you become familiar with and prepared for the individual and group activities. In addition, spend time thinking about the questions below.

- How will I define success for this meeting?
- What do I want the staff to learn during this meeting?
- What should be different when this meeting is over? If I were looking for small incremental progress, what would I like to see happening in our practice over the next several days or weeks?
- What do I need to do as a leader to make sure this meeting is successful?

Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide

5. Prepare the meeting space. Prior to beginning the meeting:

- Test all technology to ensure that the video plays correctly.
- Make sure that you have access to a whiteboard or adhesive flipchart paper for recording notes during the meeting.
- If you're using the *Staff Video Course Guide*, print one copy for each employee.

Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide



During the Meeting

- 1. Welcome employees.** When your employees arrive, open by thanking everyone for attending and share what you hope to accomplish. Share your desire to improve the practice and tell them you've found some outside resources that will help you do this together.
- 2. Begin the staff video.** Begin the staff video in the final module and follow it as you work through the rest of your meeting. Be prepared to stop, discuss, and complete activities throughout the video. Unlike the manager videos, the staff video is not broken up into separate modules. Instead, it plays continuously from start to finish. However, there are visual transitions indicating when the video is moving from one topic to the next.

On page 6, you will find a list of activities, indicated with a green leaf, in the order they appear in the staff video. On pages 7-21, you'll find an overview of each activity, instructions for facilitating them, and possible answers when applicable.

Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide

Developing a Vision for Your Practice

What is a Vision Statement?

Introduction to Activities



Vision Questions Group Activity (page 7)

Why is it Important to Create the Vision for Your Practice Collaboratively?



Creating Your Ground Rules Group Activity (page 8)

Describing the Ideal Practice



Visualizing Your Dream Vacation Individual Activity with Discussion (page 9)

Describing the Ideal Practice Part I—Individual Activity (page 10)

Describing the Ideal Practice Part 2—Sharing Your Answers with Your Team (page 11)

Defining “The Why”



Changing to Achieve Our Vision Individual Activity (page 12)

Dr. Ornish Activities (page 13)

Defining “The Why” Individual Activity with Discussion (page 14-15)

Defining “Towards” Behaviors



Defining “Towards” Behaviors Part I—Group Activity (page 16-17)

Defining “Towards” Behaviors Part 2—Individual Activity (page 18)

Defining “Away” Behaviors



Defining “Away” Behaviors Part I—Group Activity (page 19)

Defining “Away” Behaviors Part 2—Group Activity (page 20)

Sustaining Momentum



Group Activity (page 21)

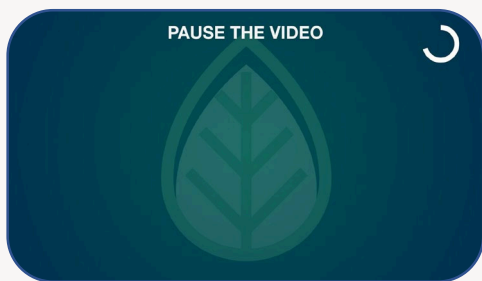
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Vision Questions



Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND ANSWER THE QUESTIONS BELOW AS A GROUP

- *How would you describe what a vision is, in your own words?*
- *What is the purpose of creating a collaborative vision for your practice?*
- *How might creating this kind of vision positively impact your practice?*

When you see this, pause the video and ask your employees to discuss the questions on the screen as a group. The purpose of this activity is to get your employees thinking about what a vision is and why they may want to create one. There are no right or wrong answers to these questions; they are simply meant to generate discussion.

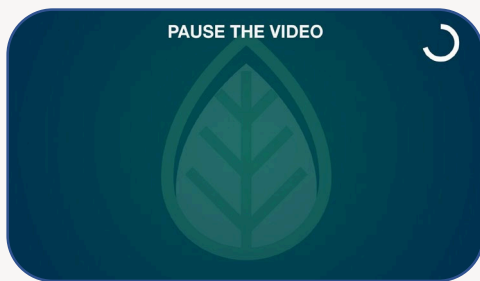
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Creating Your Ground Rules



Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND ANSWER THE QUESTION BELOW AS A GROUP

What ground rules, if any, do you want to establish for this meeting?

As people share, the person facilitating this meeting should capture their responses.

- *Focus on capturing key words and phrases*
- *Put a checkmark beside anything that is repeated*

Keep the rules you come up with visible for the remainder of this meeting.

When you see this, pause the video and ask your employees to discuss the questions on the screen as a group. The purpose of this activity is to come up with ground rules to use as you complete the group activities.

There are no right or wrong answers to this question. However, the ground rules should be aimed at helping everyone stay engaged, think creatively, participate, show respect for one another, and actively listen. Here's an example of two good ground rules:

- Everyone should participate with at least one thought during each group activity.
- People shouldn't interrupt when someone else is talking.

As people share, capture their responses on a flipchart or whiteboard by recording key points

When you're finished, keep the ground rules visible throughout the remainder of the meeting as a reference.

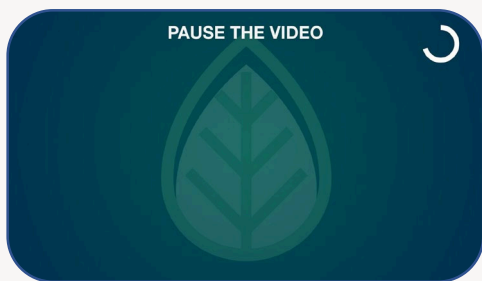
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Visualizing Your Dream Vacation



Individual Activity with Discussion

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND COMPLETE THE FOLLOWING ACTIVITY INDIVIDUALLY

Imagine you have saved up for a dream vacation. Jot down a description of what this vacation would be like.

- *Where would you go and who would you go with?*
- *What would you do, see, and eat on your trip?*
- *How would you feel the morning you were supposed to leave?*
- *How would you describe your trip to friends or family once it was over?*

When everyone is finished, take a few minutes to share your dream vacation scenario with the person next to you.

When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on a blank sheet of paper or use the *Staff Video Course Guide*.

Once your employees have had time to complete the activity, give them a few minutes to share their dream vacation scenario with the person next to them.

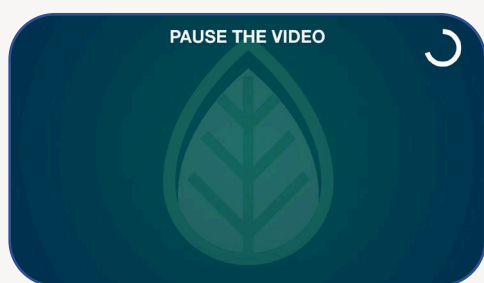
STAFF VIDEO – FACILITATION GUIDE

Describing the Ideal Practice – Part 1



Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND COMPLETE THE FOLLOWING ACTIVITY INDIVIDUALLY

Imagine it's five years from now and you're part of an incredible team in your dream practice. Write down a short description of what this practice is like. Answering some or all of the questions below might help you.

- *What do you feel like as you drive into work?*
- *What do you tell your friends or family about the place you work and the people you work with?*
- *How do you feel at the end of the day?*
- *What kind of attitude do you have when you show up?*
- *What would you tell someone who is interested in working here about the practice?*
- *How do you solve problems with your coworkers?*
- *How productive and efficient is this practice?*
- *What level of care does this practice provide?*
- *What level of service does this practice provide?*
- *How much fun do you have working here?*

When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on a blank sheet of paper or use the *Staff Video Course Guide*.

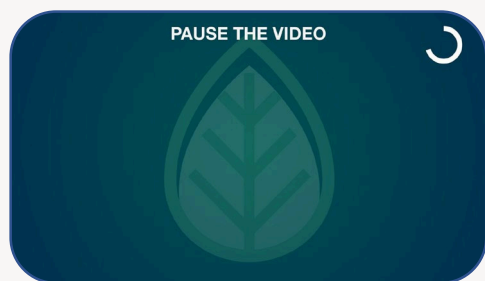
Even though they are completing this activity individually, let them know that they will be asked to share their responses during the next activity.

Describing the Ideal Practice — Part 2



Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO TAKE TURNS SHARING YOUR DESCRIPTION OF THE IDEAL PRACTICE

As you do:

- *Be sure everyone shares at least one answer*
- *Capture the key points from each person's answer on a flipchart or whiteboard*
- *Follow any ground rules you created as a team*
- *Make this a no judgement zone by avoiding commenting on other people's answers*

When you see this, pause the video and ask your employees to share their answers to the previous activity. There are no right or wrong answers to this question. However, the purpose of this activity is to come up with descriptors you can use to create a vision for your practice, so be sure that everyone shares at least one answer. As they do, capture their responses on a flipchart or whiteboard.

When you're done, post their answers somewhere you can refer to them later. You'll use them to create the collaborative vision for your practice.

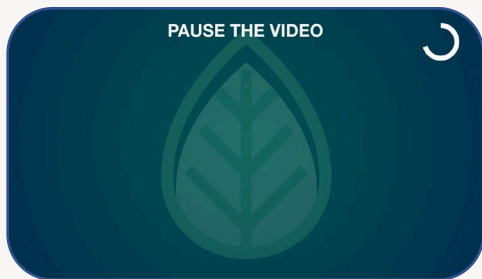
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Changing to Achieve Our Vision



Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND THINK ABOUT YOUR ANSWERS

What kinds of changes is your team going to have to make to become the hospital you've described?

What kinds of changes are you going to have to make to help your team get there?

When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on a blank sheet of paper or use the *Staff Video Course Guide*.

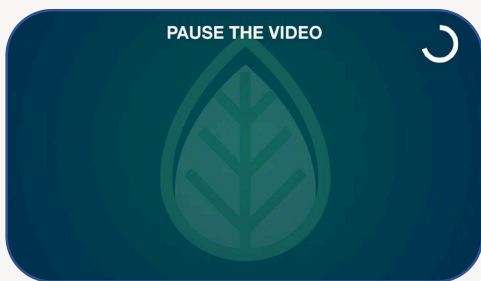
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Dr. Ornish Activities



Group Activity

During this section of the video, you will be prompted to think about or shout out answers to several different questions by screens that look like this and include the following instructions:



PAUSE THE VIDEO AND SHOUT OUT YOUR ANSWERS

*When all of this data from dozens of these kinds of studies was collected, **what percentage** of the time do you think people changed their lifestyle and maintained that lifestyle change for a period of one year?*

PAUSE THE VIDEO AND SHARE YOUR THOUGHTS

What percentage do you think he was able to get to in his study?

PAUSE THE VIDEO AND SHARE YOUR THOUGHTS

What do you think was different in the Ornish study that allowed him to get such a significant increase in sustainable behavior change?

When you see this, pause the video and ask your employees to follow the instructions on the screen. The purpose of this activity is to involve them in the story being told. You do not need to capture their responses. Instead, be sure everyone gets a chance to share at least once, and that there isn't one person dominating the conversation.

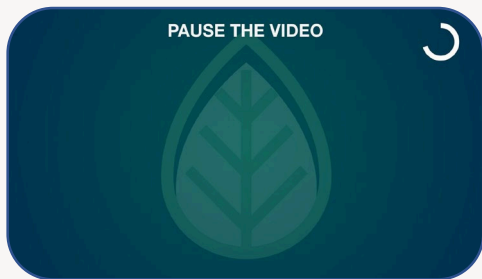
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Defining “The Why”



Individual Activity with Discussion

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND ANSWER THE QUESTIONS BELOW INDIVIDUALLY

What difference will it make for you to work in a practice like the one you and your teammates have described?

How would working in this kind of practice impact you personally and professionally?

Use the questions in the box to help you come up with answers.

*How will your evenings be better?
How will your mornings be better?
What will change about your stress level?
What will change about your happiness?
How will the amount of energy you have change?
Why is making this change important to you?
What will you learn by making this change?
Why is the future state you and your teammates have described worth creating?
How will work be more fulfilling if you can make this future state a reality?
What will be better for the animals?
What will be better for your clients?*

When you're done, share your answers. The person facilitating this meeting should capture key words or phrases from everyone's responses.

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Defining “The Why”

When you see the screen on page 14, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on a blank sheet of paper or use the *Staff Video Course Guide*. Even though they are completing this activity individually, let them know that they will be asked to share their responses.

Once your employees have had time to complete the activity, give them a few minutes to share their answers. Capture key words or phrases from their responses on a flipchart or whiteboard.

When you're done, post their answers somewhere you can refer to them later. You'll use them to create the collaborative vision for your practice.

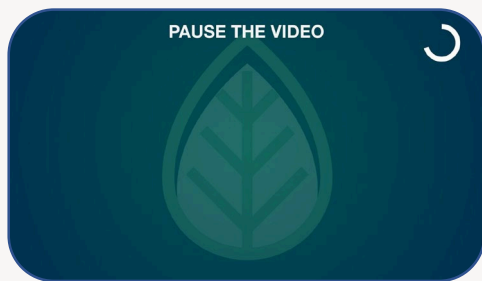
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Defining “Towards” Behaviors — Part 1



Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND ANSWER THE QUESTION BELOW AS A GROUP

What behaviors do we have to engage in every day to help us create the kind of practice we've described?

Use the questions in the box to help you come up with answers.

- *How will we need to show up in the morning?*
- *How will we need to treat each other?*
- *What will we do to make sure we are ready to be at our best each day?*
- *What will we do if we notice someone is having a rough day or struggling to execute the behaviors we've all agreed to?*
- *What will we do if someone gives us feedback on our behaviors?*
- *What will we do when we have conflict?*
- *What kind of people will we hire?*
- *What will we do if we are in a bad mood?*
- *How will we plan to have a great day here?*
- *What will we do if we feel like things aren't heading towards our best future?*
- *What else defines acting as our "best self" as we work through this change?*

When you're done, share your answers. The person facilitating this meeting should capture key words or phrases from everyone's responses.

Defining “Towards” Behaviors — Part 1

When you see the screen on page 16, pause the video and ask your employees to discuss the first question on the screen as a group. The other questions that appear in the green box can be used to help your employees think about their answer to the initial question, if needed.

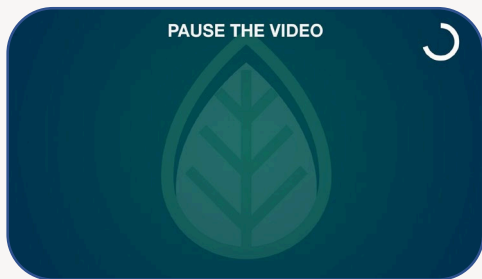
There are no right or wrong answers to this question. However, the purpose of this activity is to come up with a list of behaviors you and your employees will need to engage in to make your vision a reality, so you'll want to be sure that everyone shares at least one answer. As they do, capture their responses on a flipchart or whiteboard. When you're finished, post their answers somewhere you can refer to them later. You'll use them to create the collaborative vision for your practice.

Defining “Towards” Behaviors — Part 2



Individual Activity

During this section of the video, you will be prompted to complete an individual activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND COMPLETE THE FOLLOWING ACTIVITY INDIVIDUALLY

Look at the list of “towards” behaviors you’ve created with your coworkers. Choose 1-2 of the behaviors you personally want to work on. Make a plan for accomplishing them by answering the following questions:

- *What actions can I take to do this?*
- *How can I do this, even when it’s hard?*
- *How can I prepare to make this happen?*
- *How can I be sure I do this, even though I might not have done it consistently in the past?*

When you see this, pause the video and ask your employees to complete the activity on the screen by themselves. They can record their answers on a blank sheet of paper or use the *Staff Video Course Guide*.

They do not need to share their answers when they’re done with this activity, but you should encourage them to save their answers so they can refer to them after the meeting. Their answers to this activity outline the specific actions they can take to help you and their teammates build the practice they want.

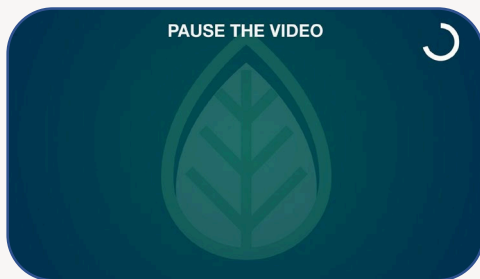
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Defining “Away” Behaviors — Part 1



Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO AND ANSWER THE QUESTIONS BELOW AS A GROUP

- *What behaviors might cause the changes we want to make in our practice to fail?*
- *What individual habits, if we don't replace them, would derail our efforts to create this kind of workplace?*
- *What might we do that's comfortable or easier, but won't be helpful as we work on this change together?*
- *Are there any ways we currently treat each other that would keep us from creating the practice we want?*

As people share, the person facilitating this meeting should capture key words or phrases from everyone's responses.

When you see this, pause the video and ask your employees to discuss the questions on the screen as a group.

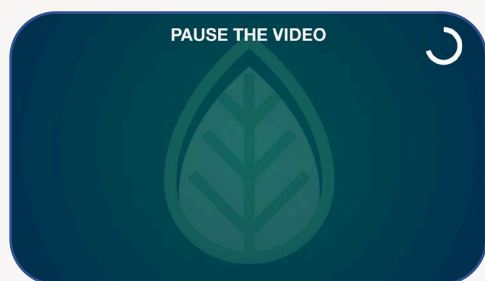
There are no right or wrong answers to these questions. However, the purpose of this activity is to come up with a list of behaviors you and your employees should avoid if you want to make your vision a reality, so you'll want to be sure that everyone shares at least one answer. As they do, capture their responses on a flipchart or whiteboard. When you're finished, post their answers somewhere you can refer to them later.

Defining “Away” Behaviors — Part 2



Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO

Now that you have defined your “away” behaviors, work with your team to turn them into “towards” behaviors. To do this, rephrase them so that they focus on what you can do, not what you want to avoid doing.

For example, “being short with clients when I’m busy,” can be turned into, “be polite and patient when dealing with clients, even when I’m busy.” Or “coming to work with a negative attitude,” can be turned into, “coming to work with a positive attitude.”

When you see this, pause the video and ask your employees to complete the activity on the screen as a group.

It’s easier for our brains to start doing something than it is to stop doing something or break a bad habit. Because of this, the purpose of this activity is to turn the “away” behaviors, or behaviors you and your employees would need to avoid, into “towards” behaviors, or behaviors you and your employees can participate in.

To do this, refer to the list of “away” behaviors you created in the previous activity, and ask your employees to help you turn them into “towards” behaviors.

Write the new “towards” behaviors on the “towards” behavior list you already created, and simply put a check mark beside anything that is repeated.

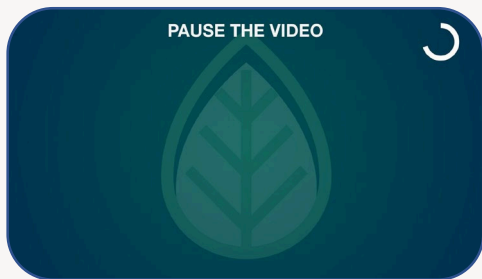
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Sustaining Momentum



Group Activity

During this section of the video, you will be prompted to complete a group activity by a screen that looks like this and includes the following instructions:



PAUSE THE VIDEO

Identify one thing you will do differently because of this meeting.

Then, share your answers with your coworkers.

Be sure everyone shares at least one answer.

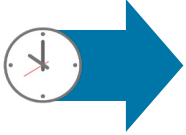
When you see this, pause the video and ask your employees to read the question and think of an answer.

When everyone has had time to think, go around the room and ask each of your employees to share his or her answer.

Ending the meeting with this activity is a great way to ensure your employees leave with at least one action they know they want to take moving forward in order to make progress towards achieving the collaborative vision.

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Team Meeting Facilitator Guide



After the Meeting

After the meeting, you have two important jobs to do.

Creating a Vision. You will need to use the information your employees have generated to create a final vision statement for your practice. Start by taking a look at your employees' descriptions of their ideal practice on page 11 of this guide. The easiest way to capture this information is to create a series of “we want” statements.

For example, if your employees came up with the following descriptors for their ideal practice:

- No drama
- No gossip
- Makes me feel energized
- Looks forward to coming to work
- Provide exceptional care

Then the “we want” statements may look like:

- We want to work in a practice that is free of drama and gossip. We want to look forward to coming to work and feel energized while we're there. We want to be known for providing exceptional care and service.

Next, take a look at the information you captured during the “Defining the Why” activity on pages 14-15 of this guide. Use this information to create one or more “we believe” statements that articulate why doing the work needed to change the practice is worthwhile.

For example:

- We believe creating this kind of culture matters for our patients, our clients, and for each other and makes our own lives happier and more fulfilling.

Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide

Finally, create a series of “we will” statements using the list of “towards” behaviors your employees created on pages 16-17 of this guide.

For example:

- We will work each day to become a team member that helps us move steadily towards this vision of the future by coming to work with a positive attitude, focusing on the needs of the patients and the clients first, and communicating effectively with others in our practice.

Once you have created a vision using “we want,” “we believe,” and “we will” statements, send it out to everyone and ask for any feedback or edits. Once the vision is finalized, post it in a place where all of your employees can see it. This way, it can serve as a constant reminder of what you all are working towards.

You might also consider posting the “towards” behaviors in the hospital where people can see them every day. You can post your other flip chart pages there as well or create a set of documents that capture what you wrote.

Achieving Your Vision. You will need to provide appropriate support as your employees work towards achieving this vision. You can do this by:

- **Reminding them to take accountability.** If the employees in your practice have looked to you to solve problems in the past, it’s likely that they will continue to do this. If your employees come to you expecting you to make a change or solve a problem, ask them:
 - Is there anything you can do that would address this problem?
 - How can I support you as you do that?
- **Supporting them as they hold one another accountable.** If your employees tell you that someone is not doing the things you all agreed to, encourage them to speak to that person directly and help them plan how they might have the conversation.

Developing a Vision to Create the Practice You Want

Team Meeting Facilitator Guide

- **Making behavior change conversations about the vision.** Conversations about changes in behavior should focus back on whether the behavior is moving the team towards or away from the collective vision.
- **Modeling the changes you want to see.** If you want those changes to be lasting, you have to model making those changes as well. In times of change, employees want to see their leaders showing effort. If they see you working to make personal changes, it will cause them to work towards making their own changes as well.