

Creating a Shared Vision for Collaborative Care

Why Create a Vision?

Visioning is an important process that provides focus and enables Collaborative Care teams to build a shared understanding of their common purpose and future goals. A powerful vision:

- Outlines a compelling reason for change and builds team commitment.
- Presents a feasible, if challenging, process.
- Conveys a picture of the future and appeals to the long term interest of all stakeholders.
- Motivates people to move out of their comfort zone and away from the status quo.
- Clarifies the general direction for the change and focuses on what needs to be achieved.
- Is flexible and can be communicated easily.
- Helps orient new team members, thus helping with turn over.
- Highlights differences in beliefs and opinions about the changes being proposed.
- Gives organizations a chance to create their own, unique vision of Collaborative Care.

Teams without clear direction often experience the following obstacles which leads to frustration and slow progress:

- Increased conflict among team members on how to achieve goals.
- People working in different directions.
- A lack of focus on future success.

Who Should be Involved?

One or two people should be identified to lead the vision building process and to recruit additional team members. Define your team broadly and include all staff who are involved in patient care and administrative support staff, including front desk, clinic manager, etc.

How do we do it?

Create the vision *after* your team has a solid understanding of Collaborative Care. Then, use facilitated conversations to go over the following questions.

Step 1: Individual Visions

Each member of the team creates a vision of his/her ideal future by answering the following:

- Why do we want to implement Collaborative Care? (possible motivating factors include improved health outcomes, increased patient satisfaction, increased provider satisfaction, increased employer/purchaser demand, improved performance indicators, financial incentives for quality care, cost savings, etc.)
- How does Collaborative Care complement our overall mission?
- How likely will Collaborative Care succeed in improving the health of our patients?
- What are my biggest hopes for implementing Collaborative Care?

Step 2: Vision Statement for Collaborative Care

Team members share their answers, raising discrepancies as questions and keeping the discussion open until there is final agreement. Work together to create a compelling vision statement that captures the essence of what your team is trying to accomplish. Remember, vision statements say where an organization wants to be and provides the inspiration for daily operations. Get creative! Maybe a visual shows your vision best.

Step 3: Operationalize the Vision

A subset of the team thinks about how to put the shared vision into practice, attempting to be as specific as possible. The following questions can guide you:

- What is the scope of our Collaborative Care program (number of sites, practices, providers, patients)?
- Which conditions do we want to treat?
- What target populations do we want to serve? (age, gender, languages, special needs, insurance benefits)
- What evidence-based psychotherapies are we going to practice?
- What services will we offer? What services can we refer patients to?
- How will we know if Collaborative Care is working? What should we measure?
- How will Collaborative Care feed into our existing quality improvement efforts?
- What strengths do we have to facilitate Collaborative Care? What challenges do we anticipate?

Step 3: Share the Vision and Revisit

Revisit your vision regularly and when the team's working conditions change. This may include changes to existing initiatives, the addition of new initiatives, changes in scope or goals, or entry and exit of team members.

