

## Creating a Shared Vision for Collaborative Care

A shared vision is a concrete way for team members within an organization to understand the purpose of a program. A powerful vision statement should stretch expectations and aspirations helping team members to jump out of their comfort zones. Use the following guide to facilitate the development of a shared vision and think about how Collaborative Care (CoCM) maps onto existing behavioral health services.

### Why Create a Shared Vision?

Visioning is an important process that provides focus and enables CoCM 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 appeal to the long term interest of 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 to CoCM, thus helping with turnover
- Highlights differences in beliefs and opinions about the changed being proposed
- Gives organizations a change to create their own, unique vision of CoCM

Teams without clear direction often experience the following obstacles which leads to frustration and slowed 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 to include all staff who are involved in patient care and administrative support staff including front desk, clinic manager etc.

### When to Create a Shared Vision?

Create the vision after your team has a solid understanding of CoCM.

### How to Create a Shared Vision?

Those identified as lead should facilitate the process through team discussions and assignments using the prompts on the following page.

## Steps for Creating a Shared Vision

### 1. Individual Visions

Each member of the team creates a vision of their ideal future by answering the following:

- Why do we want to implement CoCM? Possible motivating factors might include improved health outcomes for our patients, increased patient satisfaction with their care, increased provider satisfaction, improved performance indicators, financial incentives for quality care, cost savings and more.
- How does CoCM complement our overall mission?
- How likely will CoCM succeed in improving the health of our patients?
- What are my biggest hopes for implementing CoCM?

### 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.

### 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 CoCM Program? Consider: number of sites, practices, providers, patients.
- What conditions do we want to treat?
- What is our population(s) of focus? Consider: age, health conditions, insurance benefits.
- What evidence-based psychotherapies are we going to practice?
- What services will we offer? What services can we refer our patients to?
- How will we know if CoCM is working? What should we measure?
- How will CoCM Feed into our existing quality improvement efforts?
- What strengths do we have to facilitate CoCM? What challenges do we anticipate?

### 4. 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/exit of team members.