

The Productive Operating Theatre

Building teams for safer care™

Visoning Workshop Plan

Visioning workshop

This is the first group event and will formally launch the programme. The session is key to engaging the teams and is therefore an important event in the programme. This should be an enjoyable session that will allow all participants to meet, network, discuss issues and produce a shared vision.

Aim

- To create a local shared vision for your operating theatres to underpin the work of the programme.

Objectives

- To identify factors that will contribute to the shared vision for your theatres.
- To identify potential barriers to the vision.
- To identify champions to actively support the programme.

Organising the workshop

- Book the date well in advance at least six to seven weeks ahead so that clinicians can be available to attend.
- Ideally schedule a half-day session. Audit sessions are a suitable time for this as all teams could be available without losing operating sessions.
- Some organisations could use their audit sessions.
- Invitations can be via email, flyers, posters and speaking to key participants.
- Ideally book a venue that is off-site, with sufficient capacity to allow attendees to move around for the interactive elements.
- Think about the layout and seating and have the room for breakouts. Cabaret style, where attendees sit around tables in group of six to eight, is an ideal layout to encourage your teams to interact with each other.
- Provide food and beverages – this will be a rare opportunity for theatre teams to have a group event. The informal parts of the day will contribute to engagement and creation of a multidisciplinary team culture. Aim to have coffee and snacks available on arrival, breaks and closure – allow time for people to network at the end of event.
- Encourage different groups of staff to break up and mix with others.
- Closing the event in time for a buffet lunch will allow participants to continue discussions and network.
- Designate somebody to be the photographer – take lots of photos of the day as these can be used for story boards and newsletters following the event.

Resources

- Provide laptop, projector and screen for power point presentations, flipcharts and pens, sticky dots and sticky notes.
- Blank name badges / name labels.
- Display The Productive Operating Theatre posters.
- Camera / video to capture the events (and consent forms to be able to use the footage later).

Identify speakers / facilitators

Speakers

- Introduction by senior executive, preferably the chief executive. Ask him / her to articulate the board vision and what he/she hopes The Productive Operating Theatre will achieve and linking this to the organisation's strategic aims.
- Executive leader – to provide overview of The Productive Operating Theatre.

Facilitator

- Skills in facilitation are essential as this is an interactive workshop that relies on active participation from the group. It can be useful to have a neutral facilitator who is not part of the theatre or surgical structure, who can be seen as impartial and help the team to open up and express issues freely. Skilled facilitation may be needed to ensure that less vocal and junior staff feel able to speak up and articulate barriers and frustrations as well as their vision.

Invite participants

- 50 to 100 stakeholders including:
 - nurses
 - operating department practitioners
 - support staff – orderlies, health care assistants, clerical staff
 - anaesthetics – all grades
 - surgeons – all grades
 - theatre managers
 - key members of related departments, eg radiology, pharmacy, other clinical directorates, ward reps.

This event is focused on creating a shared vision about *what the perfect list / day feels like* and identifying what the barriers to achieving it are.

Some stakeholders may not feel this is good use of their time at this stage of the programme, eg pharmacy, wards so make sure the invitation clearly explains the aims of the workshop so colleagues from different areas can decide whether to come.

Tip: *It is important to manage staff expectations and to stay within the scope of the project plan.*

Visioning workshop plan

Below is a suggested plan for how you could run your half-day visioning workshop. Adapt it to suit your local situation. However you choose to run the session the important point is that you achieve the aim of creating a local shared vision for your operating theatre services to set the aims of the programme.

Part 1:

Approx time	Who	Process	Notes
10 mins	Chief executive	Welcome Presentation to include: <ul style="list-style-type: none"> • board vision and the importance of theatres to the organisation • organisational support for The Productive Operating Theatre. Questions and answers	For your presenters check if you will need a laptop, projector and screen.
25 mins	Executive leader	Introduction to programme Presentation to include: <ul style="list-style-type: none"> • overview of the aims of The Productive Operating Theatre • introduce the house and modules • importance of starting with the foundation modules and in particular Knowing How We Are Doing, then progressing to the enablers and then the process modules • importance of The Productive Operating Theatre to the organisation • importance of the teams and individuals involved in the programme • the programme team will provide the framework and support the work but the improvements have to be owned and implemented by the theatre teams • we will be asking for champions to put themselves forward to get involved and lead on particular elements of the programme, think about how you want to be involved • why the showcase theatres have been identified and how the wider department will be involved and when • outline your expectations of the showcase theatre, that what they learn will be spread across the whole organisation • acknowledge the amount of work that will be ahead and that it will not always be easy, there will be frustrations and that it takes a lot of organisational support for The Productive Operating Theatre. Questions and answers	Encourage staff to ask questions so they have a clear understanding of the programme.

Part 2:

Approx time	Who	Process	Notes
15 mins	Facilitator	<p>Building your vision</p> <p>The aim of the session is to develop your vision. A great outcome would be a compelling statement that describes the team's ambition for the department. You should also begin to think about what you can start to work on to achieve this. You may do this in the session or gather ideas to put together later.</p> <p>Group work</p> <p>The aims of the programme will have already been talked about but remind the group of what they are:</p> <ul style="list-style-type: none"> • patient experience and outcomes • safety and reliability of care • effective team-working and staff wellbeing • efficiency and value. <p>With these aims in mind work in small multidisciplinary groups (five to seven people) around their tables and discuss <i>what does a perfect list look and feel like and what makes it happen?</i>:</p> <ul style="list-style-type: none"> • ask the groups to record all their ideas on sticky notes, one idea per note, no limit to number of notes • groups will then feedback their ideas into a whole group discussion. <p>If people do not know each other suggest a round of introductions in the smaller group before starting discussions.</p>	<p>Working in small groups allows more people to contribute to the discussion in a given period of time and provides an opportunity for individuals who do not like to speak up in large groups to participate.</p> <p>Print out large copies of the programme aims, to act as a prompt about the context of the programme during the group work.</p> <p>Give each person some sticky notes and a pen to record their ideas.</p>
30 mins	Facilitator and scribe	<p>Building your vision – feedback and group discussion</p> <p>Get each of the groups to feedback from their discussions and put their sticky notes on a large board at the front. Group similar points together as it will highlight the importance of some key themes.</p> <p>After the feedback and discussion, recap the main points so that you have a list of criteria that your department agree would contribute to making the perfect list.</p> <p>Write the list up clearly on a separate flipchart, this will be used for the voting.</p> <p>It may be helpful to have a scribe to help theme the sticky notes and write up the final list throughout the discussion.</p>	

Part 3:

Approx time	Who	Process	Notes
15 mins	Facilitator	<p>Voting on priorities and comfort break</p> <ul style="list-style-type: none"> • Ask each participant to vote for the ideas that they think are most important by putting a dot next to it. • Decide on how many votes each participant will have (three to five). • Participants can split their votes as they wish, voting for different criteria or put all their votes on one. <p>The voting will help you to identify the issues that are most important to the department as a whole and which should be incorporated in your vision.</p> <p>If you have a large group have more than one voting station.</p>	Give each person sticky dots alternatively you can ask people to draw a dot with a pen.
5 mins	Executive leader	<p>Voting feedback</p> <ul style="list-style-type: none"> • After the break feedback the top results from the voting session. • These criteria will be used to create your theatre vision. 	
15 mins	Facilitator	<p>Identifying barriers – group work</p> <p>You have now agreed what makes a perfect list now ask the group to discuss <i>what are the barriers to the perfect list in theatres? What problems affect the day?:</i></p> <ul style="list-style-type: none"> • work in small multidisciplinary groups (five to seven people) • get the groups to record all their ideas on sticky notes, one idea per note • groups will feedback their ideas into a whole group discussion at the end. 	
30 mins	Facilitator	<p>Identifying barriers – feedback and group discussion</p> <p>Get each of the groups to feedback from their discussions and put their sticky notes on a board at the front. Group similar points together as it will show it is an important to many of the group.</p> <p>After the feedback and discussion, recap the main points so that you have list of the barriers that prevent your department from having the perfect list everyday.</p> <p>Write the list up clearly on a separate flipchart, this will be used for the voting.</p>	

Part 4:

Approx time	Who	Process	Notes
10 mins	All	Voting on barriers <ul style="list-style-type: none"> As before, ask participants to vote on the barriers they consider to be most important. 	
10 mins	Executive leader	Voting feedback <ul style="list-style-type: none"> Feedback the result from the voting. If any of the barriers are out of scope of The Productive Operating Theatre flag these up to the group. Agree to take them to the most appropriate forum for them to take them forward. Identify modules that will start to address the barriers. 	
	Executive leader	Next steps and close <ul style="list-style-type: none"> Have identified what a perfect list would be and the barriers to achieving it. Using this information the team will create a vision – a compelling statement that tells everyone about your ambition for the department. The barriers have identified areas where we can focus our attention throughout the programme. Ask the group if they would like to participate in the programme by becoming champions for particular modules or specific pieces of work. People can volunteer on the spot or talk to the programme team later. 	

Tip: Some staff will volunteer as champions at the workshop and this helps to build enthusiasm, other will want to reflect and talk to the programme team before committing themselves. You must allow for both possibilities.