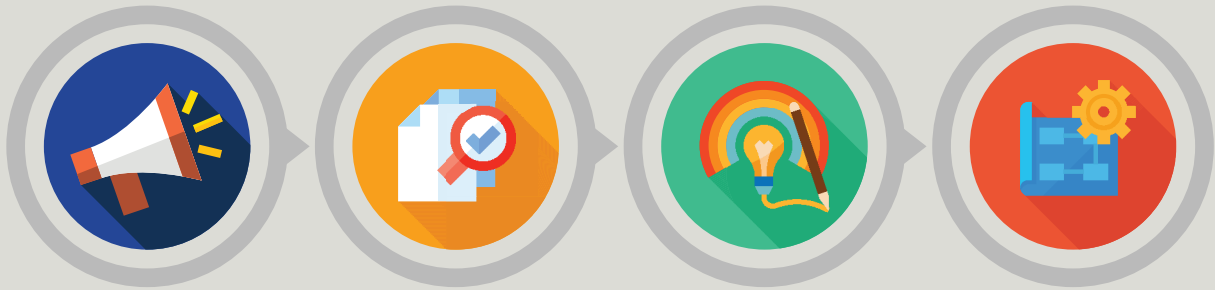




Design Thinking for Wellbeing Toolkit



Improve workplace wellbeing in home visiting programs.



This Region X project is 100% funded by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) under The Maternal, Infant, and Early Childhood Home Visiting Program, #UH4MC30465, total award of \$3,957,620.00. This information or content and conclusions are those of the author and should not be construed as the official position or policy of, nor should any endorsements be inferred by HRSA, HHS or the U.S. Government.

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The Design Thinking for Wellbeing Toolkit includes a three-step process to support home visiting programs as they apply design thinking methods to improve workplace wellbeing within their programs.

We learned from home visitors that workplace wellbeing practices could provide needed support as home visitors work with families experiencing complex and often traumatic issues related to substance misuse, mental health, and intimate partner violence. We also learned from home visitors and subject matter experts that there is no “one way” to implement wellbeing activities in the workplace that will work for every person in every program. This toolkit was designed to give home visiting programs material and guidance to identify opportunities, co-create and

implement solutions, and improve workplace wellbeing for home visitors in ways that make sense for them. Home visitors and program staff will take an active role in customizing solutions and improving their wellbeing, and therefore their ability to serve families experiencing complex issues. When home visitors feel supported and have a safe work environment, they will be more prepared to support the families and to manage the effects of secondary or vicarious trauma often inherent in this work.

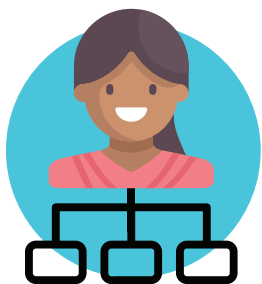
Let's get started!

Roles for the Toolkit



Wellbeing champion

The wellbeing champion can be any program member in a home visiting program, including leadership or program staff. The wellbeing champion volunteers to lead the staff through the steps outlined in the Design Thinking for Wellbeing Toolkit and is passionate about improving workplace wellbeing. No prior experience or knowledge is needed to take on this role. The wellbeing champion can be one staff member, or two staff members who have teamed up.



Leadership team





The leadership team in a home visiting program can look differently depending on the program model and organization. Leadership team is a broad term used to describe a combination (or subset) of program managers, directors, administrators, and anyone with decision-making authority over the program, which could include funders.



Program staff

The program staff includes home visiting staff roles like home visitors, parent educators, family support coordinators, nurse consultants, home visiting supervisors, early childhood coordinators, and home visitor support staff.

Toolkit Process Overview

	Goal	Who leads	Who participates	Time commitment	Resources in the toolkit
 Advocate for workplace wellbeing	Make the case for workplace wellbeing.	Wellbeing champion	Staff and administrators who need to be convinced of the importance of improving workplace wellbeing	Variable	- Make the case document
 Step 1 Gather feedback	Part I: Distribute the questionnaire Identify gaps and establish how to implement workplace wellbeing.	Wellbeing champion	Home visitors, supervisors, program managers, or administrators	15 minutes or less	- Workplace wellbeing questionnaire - Email template
	Part II: Summarize and share responses Review results and identify high priority areas for improvement.	Wellbeing champion	Staff that will participate in the idea generation process in step 2	1 hour to read and summarize (depending on number of responses)	- Worksheet to summarize and share questionnaire responses
 Step 2 Generate ideas	Generate ideas for improving workplace wellbeing in a design thinking workshop.	Delegated facilitator(s)	A selection of home visitors, supervisors, administrators and program staff from all levels/roles	2 hour workshop, 1-2 hour prep time for facilitator(s)	- Email template for invitation - Design Thinking Workshop Playbook - Workshop debrief worksheet
 Step 3 Take action	Part I: Conduct a planning session Conduct a planning session to plan how the idea(s) from the workshop will be implemented.	Wellbeing champion	Home visitors, supervisors, administrators and program staff from all levels/roles	1 hour	- Action plan template - Email template
	Part II: Implement and gather feedback Implement idea(s) and gather feedback.	Wellbeing champion or idea owner/lead	Entire program staff	4 weeks or longer	- Feedback on idea rollout questionnaire



Advocate for Workplace Wellbeing

Engage the leadership team.

**GOAL:**

Make the case for workplace wellbeing

WHO LEADS:

Wellbeing champion

WHO PARTICIPATES:

Shared across the program, though leadership buy-in is crucial

TIME COMMITMENT:

Variable

RESOURCES IN THIS TOOLKIT:

“Make the Case” document

Advocate for workplace wellbeing

The “Make the Case” document is a resource for engaging program leadership, funders, and decision-makers in thinking about why workplace wellbeing is important and deserves to be prioritized.

Workplace wellbeing and self-care are imperative at programs where staff work with families who face many serious challenges. This document describes why workplace wellbeing is the right approach to help alleviate stress-related issues faced by home visitors. It illustrates the impact on employers and organizations, the return on investment, and success stories.

If your program has already committed to workplace wellbeing at every level and is working towards improvement, you may not need this resource.



DOWNLOAD MAKE THE CASE DOC

Make the case

Improving workplace wellbeing for home visitors will positively impact the workforce and the families they serve.

In 2018, design workshops were conducted in Alaska, Idaho, Oregon, and Washington (Region X), with home visitors working with families experiencing substance misuse, intimate partner violence, and mental health issues. Working with children and families who have experienced trauma can be a significant stressor for home visitors, placing them at high-risk for developing symptoms of secondary traumatic stress (STS) (National Child Traumatic Stress Network, 2011). In the design workshops home visitors and subject matter experts collaborated and generated 948 ideas of potential solutions that would positively impact home visitors' ability to support families experiencing these complex issues. Working with children and families who have experienced trauma can be a significant stressor for home visitors, placing them at high-risk for developing symptoms of secondary traumatic stress (STS; National Child Traumatic Stress Network, 2011).

Without the tools to address secondary traumatic stress, along with other work-related stresses, the home visiting workforce risks increased compassion fatigue, burnout, and staff turnover. Through the design workshops, we learned from the participants that there may be several ways to better support home visitors in their work.

Workplace wellbeing emerged as the most promising area of opportunity for stress reduction among the workshop participants. Implementing specialized wellbeing support initiatives for home visiting staff was seen as a means to improve home visitors' ability to support families, increase overall job satisfaction and rates of employee retention, boost employee morale, and create a healthier organizational climate.

The majority of trauma-informed care approaches in social services include policies and practices to address staff wellbeing by establishing and maintaining an environment that mitigates the negative impacts of STS¹. While we heard from home visitors that self-care is encouraged and some wellbeing practices have been implemented in their programs, many described persisting barriers to practicing self-care such as time in the workday, unclear priorities, a lack of approval or support from leaders and managers, and ill-fitted techniques for a program or individual's context. These barriers have resulted in inconsistent wellbeing and stress management practices for home visitors.

This Design Thinking for Wellbeing Toolkit provides a step-by-step process for engaging leadership and empowering home visiting staff to collaborate to create customized wellbeing policies or practices in their programs. There is no single way to implement workplace wellbeing and it is

¹ https://learn.nctsn.org/pluginfile.php/180983/mod_resource/content/2/ThinkTrauma_Full_FacilitatorGuide.pdf

important to create practices that are relevant for staff who work with families experiencing trauma.

To learn more about workplace wellbeing challenges for home visitors, cost-benefit rationales, or examples of where workplace wellbeing efforts have made an impact, continue reading this section.

If you're ready to learn more about this process and review the resources in this toolkit, please skip to Step 1: Gather Feedback.

I. Workplace wellbeing challenges for home visitors

Home visitors experience stress and have the potential to experience secondary trauma through their work with families. According to the design workshop participants, some of the top stress-related issues experienced by home visitors include, but are not limited to, the following:

- **Workload** encompasses not only managing the caseload but also cancellations, reschedules, travel time, paperwork, data collection, and engagement with families and their young children who are facing stressors such as poverty, family violence, mental health issues, and/or the impacts of substance misuse². The Workforce Study conducted by the Butler Institute for Families at the University of Denver indicates that home visitors see approximately 9 families each week. Supervisors see about 4 families weekly. Home visitors spend about 13 hours each week delivering face to face home visitation services. They also report spending about 10 hours each week completing paperwork. The average caseload for a home visitor in Region X is 15 and for supervisors, it is 10.5 families.
- **Burnout** related to physical or emotional exhaustion from persistent stressors that occur over a prolonged period and are connected to work-related challenges, organizational bureaucracy, administrative demands, and a real or perceived lack of support from organization leadership^{3,4}. The Workforce Study showed that in Region X, a third of home visitors and almost a quarter of supervisors have been in the home visiting profession less than two years. Almost half of home visitors and slightly over a third of supervisors have been in their current job for less than two years. Across Region X, 12% of home visiting professionals in the sample indicated that they plan to leave their jobs within the next two years.
- **Secondary trauma** resulting from repeated exposure to high-stress work conditions due to caring for families facing multiple adversities (e.g., parental mental health, substance misuse, intimate partner violence, homelessness, adolescent parenthood) that require intensive intervention (e.g., collaboration with community agencies, and crisis intervention). Not only are home visitors likely to experience secondary

2 <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6153738/>

3 <https://www.urmc.rochester.edu/MediaLibraries/URMCMedia/finger-lakes-regional-perinatal/documents/Stress-Management-Final-revised-6-26-17.pdf>

4 <https://ideas.repec.org/a/eee/cysrev/v35y2013i4p594-602.html>

trauma while working with families in crisis, home visitors are very likely to have experienced trauma in their personal histories, which can be triggered through their work with families now. In the Workforce Study, respondents were given the option to report their Adverse Childhood Experience (ACE) scores; approximately 75.7% reported ACE scores (74.8% of home visitors and 78.3% of supervisors). Of those who shared their scores, the majority (81.1%) experienced at least one ACE. ACEs are traumatic events occurring before the age of 18. ACEs include all types of abuse and neglect as well as parental substance misuse, intimate partner violence, mental health issues, divorce or separation, incarceration identified in a public health study that were shown to impact child development and long term health outcomes⁵.

- **Isolation and feeling unsupported** due to being physically isolated (geographically or over the course of a visit-heavy travel day) or socially unsupported by supervisory and/or peer interactions that a home visitor feels are inadequate (in frequency, relevance, or psychological safety)⁶. For Region X, according to the Workforce Study, reflective supervision and support from coworkers were the two most commonly identified stress management strategies followed by self-care practices⁷.
- **Time** is scarce for home visitors when considering the typical workload of home visitors and the travel required. For Region X, according to the Workforce Study, 32% of home visitors and 52.9% of supervisors reported working longer hours than their paid hours suggest⁸. This leaves little time for self-care. Even if supervisors encourage home visitors to practice self-care, it can feel like something to do outside of the workday. This means that self-care happens inconsistently for home visitors, who have responsibilities outside of work. Without building self-care into the workplace, its unlikely home visitors have sufficient time to practice wellbeing to support their work.

II. Cost-benefit rationales for investing in workplace wellbeing

Costs to your program

When workplaces do not prioritize workplace wellbeing there can be a negative impact on employers and organizations. These negative impacts are outlined below⁹.

- **Decreased productivity** results from the number of days a home visitor's productivity is impaired by job- related stress¹⁰.

5 <https://www.dcyf.wa.gov/sites/default/files/pdf/RegXWorkforceStudyBrief4.pdf>

6 <http://cacenter-ecmh.org/wp/wp-content/uploads/2016/09/HV-Challenges-Report-9-13-16-RT-Final.pdf>

7 <https://www.dcyf.wa.gov/sites/default/files/pdf/Webinar3PowerPoint.pdf>

8 <https://www.dcyf.wa.gov/sites/default/files/pdf/RegionXWebinarPPT-Nov18.pdf>

9 <https://www.dhs.wisconsin.gov/publications/p4/p40135.pdf>

10 [https://www.who.int/mental_health/policy/services/13_policies%20programs%20in%20workplace WEB_07.pdf](https://www.who.int/mental_health/policy/services/13_policies%20programs%20in%20workplace_WEB_07.pdf)

- **High turnover** has detrimental effects on clients and remaining staff members, who struggle to give and receive quality services when positions are vacated and then filled by new personnel¹¹.
- **Increased absenteeism** due to physical and mental health issues is found to correlate with increased workload¹².
- **Increased direct and indirect expenses** including turnover, retraining, poor work performance, reduced morale, temporary coverage, early retirement, and work complaints and litigation.

Benefits to your program

Studies show that investment in staff wellbeing translates into long-term organizational viability and growth¹³. Organizations have historically thought about workplace wellbeing in terms of the benefits and costs associated with investing in programs for staff. Across many industries, including human services, studies have shown that it is worth investing in staff wellbeing whether an organization chooses to focus on tangible measures like return on investment, or subjective measures like the value of investment or the value of caring.

- **Return on Investment (ROI)** is a measure to compare the money spent on wellbeing programs to the money saved. This measure uses data including healthcare costs, absenteeism, and turnover costs compared to comprehensive wellbeing program investments. Studies have found an average ROI of 3:1 within 3-5 years of starting a workplace wellbeing program or initiative (i.e. for every dollar spent, an employer gets \$3 back).
- **Value of Investment (VOI)** is a measure that extends the value of workplace wellbeing beyond financial gain. For employees, investing in workplace wellbeing can positively affect emotional health, relationships, hobbies, and overall quality of life. For employers, it can improve company image, help to attract and retain talent, and increase employee engagement, satisfaction, morale, and workplace culture.
- **Value of Caring (VOC)** is an emerging measure that regards staff wellbeing as less of a program and more of a philosophy. It envisions a strong relationship between employee wellbeing and organizational wellbeing that reinforces mutual trust and loyalty.

11 https://www.jstor.org/stable/10.1086/323166?seq=1#metadata_info_tab_contents

12 <https://pdfs.semanticscholar.org/a2f1/e09e066d78e6282df0d830b2e11fae1fec03.pdf>

13 <https://www.dhs.wisconsin.gov/publications/p4/p40135.pdf>

No matter how you measure it, investing in workplace wellbeing is a strategy that will ensure your program has well-supported staff with everything they need to serve families experiencing complex issues like mental health, substance misuse, and intimate partner violence. .

III. Examples of approaches to support workplace wellbeing

A variety of workforce wellbeing implementation approaches have been successfully piloted across the country in commercial and social sectors. Your program may already practice some of these approaches, and your staff may need a deeper sense of leadership support and small additional practices to further workplace wellbeing.

Broad Initiatives

Wellbeing approaches below may be supported at larger systems levels like state or region and have been shown to positively impact workplace wellbeing for home visitors and other workers engaged in work with families experiencing trauma.

- **Reflective Supervision** is a supervisory approach aiming to reduce re-traumatization and reinforce personal integrity, autonomy, and control through a collaborative reflection between a service provider and supervisee. It is a standard practice in many home visiting models throughout the country, but it may be complex, or not always be implemented as advised. The Region X Innovation Grant has developed a set of Reflective Supervision guidelines to ensure quality and consistency in reflective supervision for home visiting staff, which includes home visitors and supervisors^{14 15 16 17 18}.
- **Facilitating Attuned Interactions (FANI)** model uses a combination of formal training and mentored practice in the context of reflective supervision to teach home visitors to recognize and regulate their own responses to and with families through mindfulness and self-awareness practices¹⁹.
- **NEAR@Home Toolkit** is a resource for home visitors to respectfully and effectively address Adverse Childhood Experiences (ACEs) with families. NEAR stands for Neuroscience, Epigenetics, ACEs, and Resilience. The NEAR@Home toolkit was developed as a self-study process and is being shared without cost or restrictions as many programs do not have the financial resources for in-person learning.

14 <http://www.dcyf.wa.gov/sites/default/files/pdf/RegionX-ReflectSupGuidelines.pdf>

15 http://www.multiplyingconnections.org/sites/default/files/RS%20White%20Paper%20%28Rev%206--11%29_0.pdf

16 <https://eric.ed.gov/?id=EJ1123744>

17 <https://eclkc.ohs.acf.hhs.gov/sites/default/files/pdf/what-makes-supervision-work.pdf>

18 <https://www.zerotothree.org/resources/1020-reflective-supervision-essentials>

19 <https://www.erikson.edu/professional-development/facilitating-attuned-interactions/>

Home visiting professionals are uniquely positioned to talk with parents about NEAR – especially about how their ACE histories may be impacting their lives and may influence their parenting²⁰. Home visitors have said that learning about NEAR to support families has also helped them with their own resilience.

- **Mindfulness-Based Stress Reduction** is a strategy that has been tested repeatedly with classroom-based teachers and has been found effective to reduce burnout. A systematic review focused on teachers found the most consistent result was improved teacher emotion regulation²¹. In one waitlist control trial teachers who were randomized to get mindfulness training had better attention, working memory, occupational self-compassion and lower occupational stress and burnout²². Florida is using a MIECHV Grant to test a mindfulness intervention for their home visitors. The evaluation is not yet complete²³.
- **Hiring dedicated workplace wellbeing personnel** to promote actionable compassion through training programs, which teach mindfulness and empathy to employees, families, and organizations. This can be a full-time employee, a consultant, or even a staff member filling this roll with a reduction in other responsibilities²⁴.

Focused Initiatives

Focused initiatives are small changes to the workplace culture that home visitors shared as ways to improve workplace wellbeing during design workshop activities in 2018.

- **Mindfulness** including breathing reminders during meetings, guided breathing at the end of reflective supervision, meditation space, yoga at work, etc.
- **Peer activities** including cooking classes, games, recipe sharing, book club, massage classes, team lunches, team-building activities, etc.
- **Changing environments** through walking meetings, working in a coffee shop, bringing pets or children into work on special days, flexibility to work from home, decorating the office, yoga balls or other ergonomic desk changes, etc.
- **Emphasizing the positives** by sharing small success stories, highlights of home visiting, why you are

20 <https://www.nearathome.org/>

21 <https://link.springer.com/article/10.1007/s12671-017-0691-4>

22 <https://psycnet.apa.org/record/2013-14682-001>

23 <https://www.ncbi.nlm.nih.gov/pubmed/27965223>

24 <https://www.brightonjones.com/blog/compassion-director/>

a home visitor, etc.

- **Access to resources** including regular podcasts or emails on self-care, access to mental health counseling, training, tips or tools for practicing mindfulness throughout the day, etc.
- **Wellbeing organizational policies** including check-ins with supervisors check-ins to discuss self-care activity with supervisees, staff from all levels of the organization practicing self-care regularly, dedicated paid time for self-care activities, etc.

Improving workplace wellbeing can be achieved through incremental changes from the focused initiatives section or broad initiatives. The changes will look differently in every workplace and depend on the community and cultural context, as well as the individual needs of staff. Using this toolkit will help your program identify strengths and how to emphasize them, as well as discover opportunities to improve and ideas for how to do so in a customized and trauma-informed way.

IV. Summary

Improving the work-life of home visitors and giving them the tools and support to manage stress and navigate trauma for themselves and for the families they work with leads to a more effective workforce. Workplace wellbeing contributes to reduced burnout and turnover, increased staff capabilities, and more engaged staff that serve as home visitors in our communities.

Step 1



Gather Feedback

**Distribute the questionnaire.
Summarize and share the responses.**



Step 1

Gather feedback

GOAL:

Identify gaps and establish a baseline understanding of how well workplace wellbeing practices are implemented and integrated in your workplace

WHO LEADS:

Wellbeing champion

WHO PARTICIPATES:

Home visitors, supervisors, program managers or administrators

TIME COMMITMENT:

15 minutes or less

RESOURCES IN THIS TOOLKIT:

The workplace wellbeing questionnaire

Email template

Distribution and collection guidance

PART I: Distribute the questionnaire

The workplace wellbeing questionnaire is a tool to assess organizational readiness, employee sentiment and safety, and potential gaps in practice or perception of wellbeing support at the leadership and the home visitor levels.

This questionnaire helps programs understand their workplace wellbeing initiative baseline. This questionnaire should be completed by program staff, including both home visitors and the leadership team. The questionnaire is designed to be anonymous and should take about 15 minutes to complete.



Step 1

Gather feedback

PART I: Distribute the questionnaire

INSTRUCTIONS:

1. Determine the best method of informing the program staff about the questionnaire and to encourage participation. Refer to distribution guidance on the next page.
2. If email is the best method for your program, use the 'Distribution guidance and email template' and customize the copy as needed. Attach the fillable and print-ready questionnaire with the email.
3. If handing out printed copies of the questionnaire works better for your program, send an email to program staff letting them know where they can find hard copies of the questionnaire.
4. Let respondents know where to submit or drop off their completed questionnaires.



DOWNLOAD THE QUESTIONNAIRE



Distribution and collection guidance:

Home visiting programs across Region X (Alaska, Idaho, Oregon and Washington) differ based on program size, model, geography, and/or funding sources. Every program has its own preferred communication protocol.

To invite program staff to respond to the workplace wellbeing questionnaire, decide which method of gathering feedback would be best for logistical and privacy reasons. It could be:

- An email with background and purpose, along with the fillable form PDF questionnaire as an attachment.
- An email or message posted on a bulletin board with the background and purpose along with the location where a printed copy can be picked up.
- An office mailbox or drop box for respondents so that the process of giving feedback remains anonymous.
- Consider re-creating the questionnaire in a free online survey tool like Typeform, Survey Gizmo, Survey Monkey, or Google Forms. This requires more work from the Wellbeing Champion but will increase convenience and anonymity and simplify analysis. Just be careful to copy the words and answer choices verbatim!

Invitation to respond to the workplace wellbeing questionnaire

Below is a suggested copy to use in your email communication to invite staff to respond to the workplace wellbeing questionnaire.

New Message — ×

To Cc Bcc

Subject **Workplace wellbeing questionnaire | Reflect on your experience at [Program_Name]**

Dear [Name],

We would like to learn what your experience has been with workplace wellbeing at [Program_Name]. As a program, we would like to learn from staff members, what is working and what can we do better to make [Program_Name] a workplace where you feel heard, supported, and where you have the opportunity to grow as a home visiting professionals.

To share your thoughts and feedback, you can respond to a short 11-question questionnaire that is [attached with this email]/ [can be found at desk/room number]/[in the anonymous link below]. Once you have completed the questionnaire, [drop it off in the (anonymous location)]/[print the PDF and drop it off in the (anonymous location)]/ [submit it directly on (survey website)].

The last date to respond to the survey is MM/DD/YY. Make your voice heard!

Why are you being invited to participate?
You matter! Staff is our most valuable asset. We would like to assess how we are doing as a program and what more we can do to give you a better workplace experience.



What happens after you respond to the questionnaire?
After responses have been collected, [name of Wellbeing Champion identified] will summarize the feedback and identify strengths and opportunities in workplace wellbeing at [Program_Name]. The results of the questionnaire will be shared will all staff members.

Contact [Wellbeing champion @ email] with any questions. The last date for responding to the questionnaire is MM/DD/YY!

Best,

[Your name]

Note: This invitation has been approved by [leadership team member name] at [program name].

[Send](#)  



[DOWNLOAD EMAIL INVITATION](#)

Workplace wellbeing questionnaire

This questionnaire is distributed to all members of your program, to begin reflection and discussion of how workplace wellbeing is supported at your program. Participation is voluntary and responses will only be used internally.

Instructions: Consider each question carefully and check how frequently your program follows these practices. Only some questions require a written response, but each has a comment section for providing more explanation to the answer. You can type responses into this document directly. When finished, submit your responses according to instructions given in the email.

Questions	Never	Sometimes	Mostly	Always	I don't know
1 Are staff members encouraged to take breaks, including lunch and vacation time?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments: _____ _____					
2 Does your program provide paid time for self-care activities at work?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments: _____ _____					
3 In the past 6-8 months, has your program provided paid opportunities for education on stress-management, mindfulness, signs of burnout, compassion fatigue, and/or vicarious/secondary trauma?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
List any you have done, and when you did them: _____ _____					
Comments: _____ _____					

Questions

Never

Sometimes

Mostly

Always

I don't know

- 4 In the past 6-8 months, has your program provided paid opportunities for professional development and training to grow within your role in the home visiting field?

List any you have done, and when you did them: _____

Comments: _____

- 5 Consider the last 4-6 months at your workplace and the challenges you, your colleagues, or families might have had related to substance misuse, mental health issues, and/or intimate partner violence. Does your program have protocols in place for addressing the challenges in a timely, confidential manner that is to your satisfaction?

Comments: _____

- 6 Are staff members able to discuss concerns about the program or their job with managers/leadership team members without negative consequences? (e.g., being treated differently, feeling like their job is in jeopardy or having it impact their role on the team)

Comments: _____

Questions**Never****Sometimes****Mostly****Always****I don't know**

- 7** Are there opportunities for team building among staff members?

Comments: _____

- 8** Do you feel physically and psychologically safe in your work environment? (Psychological safety means feeling safe at the office, on home visits, and in taking risks, and being vulnerable in front of colleagues)

Comments: _____

- 9** Do you feel like your program promotes workplace wellbeing for home visitors and all other staff members?

Comments: _____

- 10** Is reflective supervision practiced regularly with home visitors and supervisors?

Comments: _____

- 11** Any additional comments? _____

**GOAL:**

Review results and identify high priority areas

WHO LEADS:

Wellbeing champion

WHO PARTICIPATES:

This information will be shared back with respondents and attendees to Step 2: Generate ideas

TIME COMMITMENT:

1 hour

RESOURCES IN THIS TOOLKIT:

Questionnaire Analysis
Worksheet

PART II: Summarize and share responses

After members of staff have completed the questionnaire, the wellbeing champion should collect and read the responses.

Use the worksheet to count responses and identify strengths and opportunities. Summarize and share the results before the next step. This also gives the leadership the opportunity to identify available resources and constraints before members of staff come together to generate ideas of how workplace wellbeing can be improved.



Step 1

Gather feedback

PART II: Summarize and share responses

INSTRUCTIONS:

1. Collect and count completed questionnaires.
2. Use the 'Questionnaire Analysis Worksheet' below to summarize responses.
3. Share the summary with the leadership team and program staff.

Note: #1 can be skipped if you collected responses with a free online survey tool.



DOWNLOAD ANALYSIS WORKSHEET

Questionnaire analysis worksheet

The wellbeing champion will collect the completed questionnaires from all respondents and summarize the results. If a digital survey tool is used that summarizes results automatically, this worksheet is not needed.

Instructions: Go through each response sheet and tally the scaled answers per question. Summarize the themes from the write-in responses and fill out the questions at the end according to your overall impressions. Use the demographic questions at the end (role, time in program) for context for the responses when needed.

Total Responses: _____ **Date:** _____

Responses and Themes: Individual Questions **Never** **Sometimes** **Mostly** **Always** **I don't know**

1 Are staff members encouraged to take breaks, including lunch and vacation time?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Summary and themes from write-in responses: _____

2 Does your program provide paid time for self-care activities at work?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Summary and themes from write-in responses: _____

Responses and Themes: Individual Questions **Never** **Sometimes** **Mostly** **Always** **I don't know**

3 In the past 6-8 months, has your program provided paid opportunities for education on stress-management, mindfulness, signs of burnout, compassion fatigue, and/or vicarious/secondary trauma?

Summary and themes from write-in responses: _____

4 In the past 6-8 months, has your program provided paid opportunities for professional development and training to grow within your role in the home visiting field?

Summary and themes from write-in responses _____

Responses and Themes: Individual Questions Never Sometimes Mostly Always I don't know

5 Consider the last 4-6 months at your workplace and the challenges you, your colleagues, or families might have had related to substance misuse, mental health issues, and/or intimate partner violence. Does your program have protocols in place for addressing the challenges in a timely, confidential manner that is to your satisfaction?

Five empty boxes for rating the response from 1 to 5.

Summary and themes from write-in responses: [Four horizontal lines for text entry]

6 Are staff members able to discuss concerns about the program or their job with managers/ leadership without negative consequences (e.g., being treated differently, feeling like their job is in jeopardy, or having it impact their role on the team)?

Five empty boxes for rating the response from 1 to 5.

Summary and themes from write-in responses: [Four horizontal lines for text entry]

Responses and Themes: Individual Questions Never Sometimes Mostly Always I don't know

7 Are there opportunities for team building among staff members?

Five empty boxes for rating the frequency of team building opportunities.

Summary and themes from write-in responses: [Four horizontal lines for notes]

8 Do you feel physically and psychologically safe in your work environment? (e.g.: feeling safe at the office, on home visits, and in taking risks and being vulnerable in front of colleagues)

Five empty boxes for rating the frequency of feeling safe in the work environment.

Summary and themes from write-in responses: [Four horizontal lines for notes]

9 Do you feel like your program promotes workplace wellbeing for home visitors and all other staff members?

Five empty boxes for rating the frequency of program promoting workplace wellbeing.

Summary and themes from write-in responses: [Four horizontal lines for notes]

Responses and Themes: Individual Questions **Never** **Sometimes** **Mostly** **Always** **I don't know**

10 Is reflective supervision practiced regularly with home visitors and supervisors?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

Summary and themes from write-in responses: _____

11 Any additional comments? _____

Summary

Based on the responses to the workplace wellbeing questionnaire, what is your program doing well?

Where are the opportunities for your program to improve workplace wellbeing practices?

Are there other general themes in the responses?

Do you have any other thoughts?

Step 2



Generate Ideas

**Conduct a collaborative
design thinking workshop.**



Step 2

Generate ideas

GOAL:

Generate ideas for improving workplace wellbeing

WHO LEADS:

Delegated facilitator(s) or wellbeing champion

WHO PARTICIPATES:

A selection of home visitors, supervisors, administrators, and program staff from all levels/roles

TIME COMMITMENT:

1-2 hour prep time for the facilitator

2 hour for the workshop

RESOURCES IN THIS TOOLKIT:

Invitation to participate in the design thinking workshop
Template

Design Thinking Workshop
Playbook

Workshop Debrief Worksheet

The design thinking workshop allows all team members to collaborate on brainstorming solutions that could be implemented to improve workplace wellbeing in the program.

To successfully conduct a design thinking workshop, the 'Design Thinking Workshop Playbook,' below, provides step-by-step instructions for planning and facilitating the meeting. The playbook contains a selection of group activities meant to define, scope, and solve complex problems. The playbook explains creative processes that are customized for home visiting programs.

Created to include diverse perspectives from across the program, the workshop creates a safe space for discussion and a level playing field. The workshop helps record the challenges, ideas generated to solve them, and prioritizes those ideas. During the workshop results from the questionnaire may be shared with staff along with an explanation of what came out of their participation in the questionnaire.



Step 2

Generate ideas

INSTRUCTIONS:

1. Use the 'Invitation to participate in the design thinking workshop Template' to invite participants to the workshop.
2. Use the instructions outlined in the Design Thinking Workshop Playbook to plan, prepare, and conduct a design thinking workshop.

New Message



To

Cc Bcc

Subject **Join Us for a design thinking workshop on DAYOFWEEK MM/DD**

Dear [Name],

We are excited to invite you to a 2-hour design thinking workshop focused on workplace wellbeing at [Program_Name].

What is a design thinking workshop?

A design thinking workshop is a method used by teams to rapidly brainstorm and develop ideas in a time-bound way. Participants will work together to brainstorm ideas, flesh them out, and get feedback. The process is meant to be creative, collaborative, and fun.

Why are you being invited?

You recently responded to a workplace wellbeing questionnaire and shared your perspective on the implementation of practices in our program. We are conducting a design thinking workshop to identify ideas and opportunities for home visitors and staff members at [Program_Name] with the goal of program-wide improvements in workplace wellbeing.

Here are the workshop details:

Date and Time: [month, date, year; time duration]

City: [City_Name]

Location: [Name and address of location]

Unique perspectives such as yours will help ensure that the workshop is a success and we encourage you to confirm your participation by replying to this email.

What happens after the workshop?

We will end the workshop with a prioritized list of high impact ideas to share with the leadership team for a collaborative implementation action plan. No preparation or prior experience is required to participate.

Contact [*Wellbeing champion @ email*] with any questions. We look forward to seeing you on *MM/DD*!

Best,

[Your name]

Note: This invitation has been approved by [leadership team member name] at [program name].

Send



DOWNLOAD EMAIL INVITATION



Design Thinking Workshop

Playbook



DOWNLOAD THIS PLAYBOOK

Table of Contents

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P 39	How to use this playbook
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“Design thinking is a human-centered approach to innovation that draws from the designer’s toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success.”

– Tim Brown, CEO of IDEO



Design Thinking Defined:

Design thinking is an innovative design philosophy and a method for problem-solving used in all industries for creating better products, services, and experiences. It is highly participatory with a focus on collaborating, listening, empathizing with the people who will use the product, services, or experiences, and early testing and repeating, that is responsive to the needs of these people.

Design thinking is useful when tackling complex problems that are difficult to define because it involves the people affected by these problems in the process of identifying possible solutions.

There are four components to design thinking:

01 Human-centered

The process starts and ends with the people we are designing for. This approach develops solutions to problems by involving the human perspective in all steps of the problem-solving process. Personal experience is valuable expertise.

02 Collaborative

Workshop participants bring diverse skill sets, ideas, experiences, and insights. The workshop is highly collaborative and allows diverse voices to solve problems together where all opinions are equal.

03 Iterative

Design thinking is a cyclic process of prototyping, testing, evaluating, and enhancing. This allows you to test and enhance solutions early and rapidly.

04 Creative and playful

Creating an open, playful atmosphere is critical to fueling creativity. It allows you to frame the problem in a new way, look at it from different perspectives and consider a variety of solutions.

How to use this workshop playbook:

This playbook will help you (the facilitator):

- Coordinate and facilitate a two-hour design thinking workshop for your organization with the participation of home visitors, supervisors and leadership.
- Identify ways to improve the workplace wellbeing of home visitors who work with families experiencing trauma from issues like substance misuse, intimate partner violence and mental health issues.
- Generate ideas and collaborate to identify possible customized practices and solutions to improve workplace wellbeing of home visitors in your program and community context.

This playbook includes:

- A step-by-step process to implement a design thinking workshop for your program focused on improving workplace wellbeing.
- Facilitator guidelines and best practices for a successful workshop.
- A detailed agenda of the two-hour design thinking workshop.
- Helpful templates and a list of materials needed for the workshop.

How to use this playbook:

- This playbook demonstrates one way to conduct a design thinking workshop. The design thinking process is flexible and adaptable if you would like to customize it to meet the needs of your team. We recommend following this agenda and spending no less than two hours for the activities outlined. More time can be added as appropriate for your context.
- It is important to note that no design or technical background is needed to participate in or facilitate this workshop.
- We encourage the wellbeing champion(s) and leadership team to review this playbook prior to the workshop.
- The facilitator should review all material prior to the workshop.

01 Planning

Planning is the key to a good design thinking workshop. It ensures the best use of everybody's time. Ideally, planning should take place one to two weeks prior to the workshop.

Here are a few tips to help you get ready for your workshop:

- Schedule at least two hours for the workshop.
- All participants should attend in-person for optimal results.
- Secure a workshop location that can accommodate all participants and activities of the workshop to promote in-person participation.

To spark participants' creativity, consider finding a room that is open, spacious, well-lit, with lots of wall space for sticky notes.

There are three tasks to complete prior to the workshop:



Choose the workshop facilitator



Identify and invite participants



Prepare the agenda

01 Planning



Choose the workshop facilitator

One or two facilitator(s) will lead the design thinking workshop for your program. The facilitators helps participants feel comfortable and encourage sharing during the session. The facilitator will need to allocate one to two hours prior to the workshop to:

- Review the responses from the questionnaire (Step 1).
- Read the facilitator guidelines and best practices.
- Understand the rules of conduct.
- Assess and adjust the agenda.
- Learn the steps of the activities used during the workshop.
- Gather the necessary materials.

The facilitator should be someone who:

- Has experience facilitating a meeting.
- Is good at monitoring conversational flow.
- Can elicit interaction from everyone without bias.
- Keeps the conversation on track and generates engaging questions when the conversation begins to lull.
- Maintains a high energy level and active participation from the group.
- Is a good listener.

01 Planning

FACILITATOR GUIDELINES AND BEST PRACTICES

1. Design thinking workshop overview and workshop brief (5 min)

Set the tone

The facilitator sets the tone of the workshop. The appropriate tone helps to keep the conversation productive and maintains participation. This is achieved when the facilitator successfully creates a space in which participants feel comfortable enough to share their thoughts and ideas freely. The facilitator should remain neutral and continuously encourage participants to engage in the conversation and activities.

Manage time

Time management is crucial for success. Brainstorming, critiquing, and prioritizing exercises all support both exploration and productivity. Planning the session in advance and adhering to the allocated time for each agenda item will assure there is time for exploration of a wide set of ideas. It will also lead to the creation of a shared vision in two hours.

Keep discussion on track

The facilitator must keep the discussion relevant and on track. It is important to redirect a conversation that might be tangential. The facilitator must also create an environment where all participants are actively sharing their thoughts and where the conversation is not dominated by one or two people.

01 Planning



Identify and invite participants

The workshop should include program staff such as home visitors, supervisors, and leadership team members, specifically, program managers and administrators. Staff provide input from their perspectives and have the opportunity to listen to each other in an equal setting.

Including staff of different roles in a collaborative process can positively impact workplace wellbeing by improving both the program and the individual effectiveness in supporting families. No design or technical background is required to participate.

- Assess how many members you'll have for the workshop, considering availability and representation of different roles within your program. More members take advantage of your team's diverse perspectives but too many may diminish participation of each individual, while less members will allow

01 Planning

more participation from each individual but include fewer unique perspectives. We recommend a number between 3-15 participants per workshop. If you have more staff you want to include, consider adding a second facilitator and splitting people into groups of 15 or less for activities. You may also consider holding multiple separate workshops. If you hold separate workshops, make sure that there are a diverse group of people in each workshop. Include home visitors, supervisors, and administrators in a workshop together, and do not hold separate workshops for each role.

- Send out an invitation to all participants via your organization's standard meeting invitation channels one to two weeks prior to the design thinking workshop. Provide background information about the design thinking workshop in your communications and clearly differentiate the workshop from a typical meeting by mentioning that it is a unique interactive workshop and has the opportunity to affect workplace wellbeing in your program.
 - Include the [“Make the Case” document](#), and the questionnaire responses summary in the e-mail, and ask that both documents be read before the workshop.

[GET EMAIL INVITATION COPY](#)

01 Planning

- In addition to sending a calendar invite, find an opportunity to talk to people in person about the workshop. Share that you will hold a creative, interactive meeting where the team will think of potential ways to improve workplace wellbeing in a collaborative manner.
- Share the agenda and rules of conduct a week before the workshop when you remind participants to attend.

01 Planning



Prepare the agenda

Design thinking workshops can stretch across days or be held in a few hours. This playbook offers a condensed, rapid ideation, and solution-focused workshop to get the most out of the time your home visiting program has together.

Below is the recommended agenda for a two hour design thinking workshop, developed specifically for this toolkit for improving workplace wellbeing in home visiting programs. You can adapt this agenda or use it as-is for your design thinking workshop.

The agenda should include specific activity names and time allotment for each activity. Make sure to plan time for instructions, breaks, and questions from your team.

01 Planning

Design thinking workshop agenda (2 hours):

I. INTRODUCE: (20 min)

1. Introduction and review of workshop brief (5 min)
2. Ground rules (5 min)
3. Icebreaker activity (10 min)

II. UNDERSTAND: (25 min)

4. Positives (8 min)
5. Challenges (8 minutes)
6. Vote (4 min)
7. How might we (5 minutes)

BREAK (5 min)

III. SOLVE (60 min)

8. Generate solution ideas (20 min)
9. Vote (5 min)
10. Effort-impact scale (20 min)
11. Planning experimentation (15 min)

IV. REFLECTIVE CONVERSATION, SUMMARY, AND NEXT STEPS (10 min)

[GET AGENDA DOCUMENT](#)

02 Materials and checklist

Use this checklist to ensure that you have everything you needed for a successful design thinking workshop:

Supplies:

- Timer
- One black sharpie per person (plus extras)
- Square sticky notes: two colors, about one pad of each color for every two attendees
- Sticker dots: two colors (recommended: little red, big green), three red and six green per attendee (colored markers may be used instead of stickers)
- Appropriate “thinking” music playlist (positive and high-energy)
- Whiteboards with erasable markers or large sticky pads
- Copies of the questionnaire response summary and the [*Make the Case*](#) document

03 Running the workshop

Below you will find all the content, information and materials needed to run the two-hour design thinking workshop as a facilitator.

I. INTRODUCTION: (20 min)

Start time: _____

1. What is a design thinking workshop? (5 min)

- Welcome everyone and thank them for taking the time to participate. Have each participant introduce themselves by name and role.
- Summarize what a design thinking workshop is, what has been done to date and what is planned for the session. Remind them that their participation is a crucial part of the process. For example, you could say:

“A design thinking workshop is a collaborative and creative exercise where we get people with different perspectives to come up with ideas that might help solve problems. Today we are going to do this. It should be fun, creative, and everyone should feel comfortable and welcome to actively participate. You are each here because you have unique experiences and perspectives to share that can help us generate great ideas as we try to improve workplace wellbeing for home visiting staff, which in turn will help us continue to serve the families we work with. We are going to start today by briefly sharing what we learned from the workplace wellbeing questionnaire. Then we will launch into some activities that will get our creativity flowing and help us focus on how we want to improve workplace wellbeing in our program.”

03 Running the workshop

- Quickly share the summary of responses from the questionnaire completed by participants in Step 1 of this toolkit.
- Allow for some discussion and transition to the next activity when the time for the introduction runs out (10-15 minutes). Let participants know that they will dive back into ideas and discussion of workplace wellbeing soon with the next set of activities.

03 Running the workshop

2. Review the ground rules for the session (5 min)

Summarize or read aloud the ground rules:

- **Creative confidence:** Share all ideas that pop in your head, regardless of how silly or outrageous they seem.
- **Quantity over quality:** Throw as many ideas out there as possible. We will organize and focus later in the workshop.
- **No bad ideas:** Even ridiculous ideas teach us about constraints and widen our horizon. Some of the most outrageous ideas are wildly successful.
 - It is important to reinforce the notion that there are no bad ideas. You can share the following anecdote with everybody as an example: *The entire point of a photograph is to preserve a moment in time so you can go back and look at it later, yet Snapchat (a multimedia messaging mobile app) swooped in with an idea that subverted the purpose of photographs: making them temporary/disappear. This is arguably a dumb/terrible idea, yet it turned out to be a hugely successful company.*

Every voice is important: This room contains an equal environment. Everyone here has a unique perspective and we need to hear it. We need to welcome and acknowledge each other's ideas and opinions, even if we might disagree. When you take turns sharing ideas practice saying "Yes, and..." before you share your idea. Build positive momentum with this simple phrase.

03 Running the workshop

- **Work as a team:** Collaboration is key. If you notice someone hasn't had a chance to speak, make space for them to share and ask them what they think.
- **Share what you learn:** Sharing your thoughts and ideas can inspire others in their creative process.

03 Running the workshop

3. Ice breaker activity (10 min)

To be creative, act creatively! This icebreaker breaks away from a typical formal meeting environment and warms up participants for discussion.

Grandma, Tiger, Ninja

This warm-up is a huge hit in all types of workshops. It's similar to rock, paper, scissors, except you act out each role with your entire body. For example, a Grandma would be using cane or walker, a tiger would leap up and go "rawr", and a ninja would strike a ready-to-attack pose. Remember:

- Ninja beats Tiger (because it's a Ninja)
- Tiger eats Grandma
- Grandma beats Ninja (because she's the Ninja's Mom)

Starting in pairs, the winner moves on and the loser becomes the winner's biggest fan. By the end, the last two people will play for the championship title, each with a massive cheering section.

Purpose: Building camaraderie and getting participants out of their comfort zone.

Before beginning with any brainstorming, people must laugh at least once. A warmup that makes participants smile helps.

- *The Design Thinking Playbook* by Michael Lewrick

03 Running the workshop

II. UNDERSTAND: (25 min)

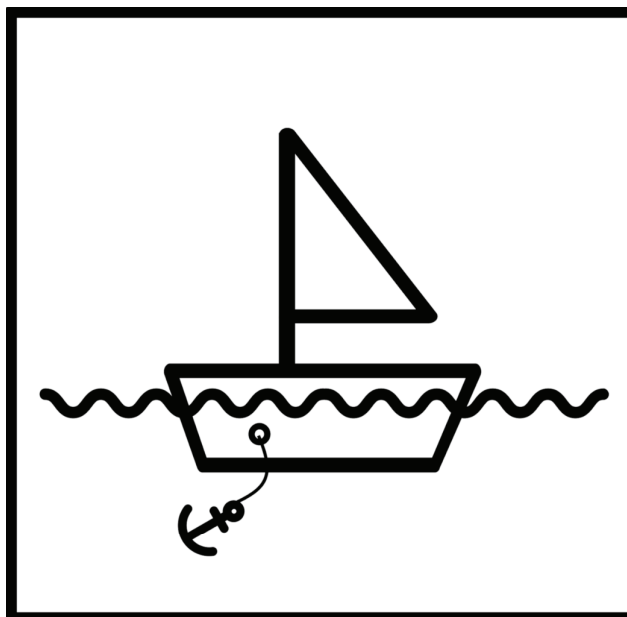


Current time: _____

1. Setup

Tell participants to consider the thoughts they had while individually completing the questionnaire and reading the [Make the Case document](#). Then, draw a sailboat with a dropped anchor on the whiteboard or a large sticky pad.

- It needs to have a water line halfway down, a billowing sail, and an anchor that hangs down below the water.
- The top half (the wind in the sail) represents things that are moving us forward or working well, and the bottom half (the anchor) represents things that are holding us back or not going well.
- Make sure there's enough space for a good number of sticky notes in each half.



Positives:

What's supporting workplace wellbeing?

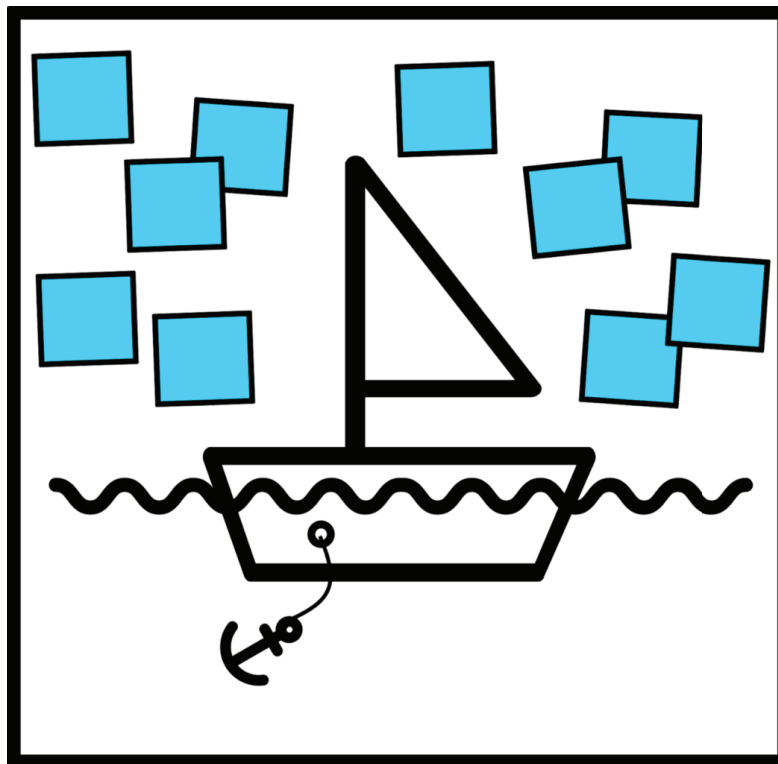
Challenges:

What's a barrier to workplace wellbeing?

03 Running the workshop

2. Identify the positives (8 min)

- Using the first color of sticky notes with one thought per note, everyone writes positives about the program's contribution to the home visitors' workplace wellbeing. Set a timer for 6 minutes.
- Encourage the participants to write as many positives as possible. Don't worry about duplicates, we'll organize ideas later.
- Have each person come up to the board and read their note out loud before placing it "above the water" next to the sailboat.
- Remind people to say "Yes, and..." before they add each new idea.
- Use your last two minutes to wrap up the positives and congratulate the group on identifying so many strengths.



03 Running the workshop

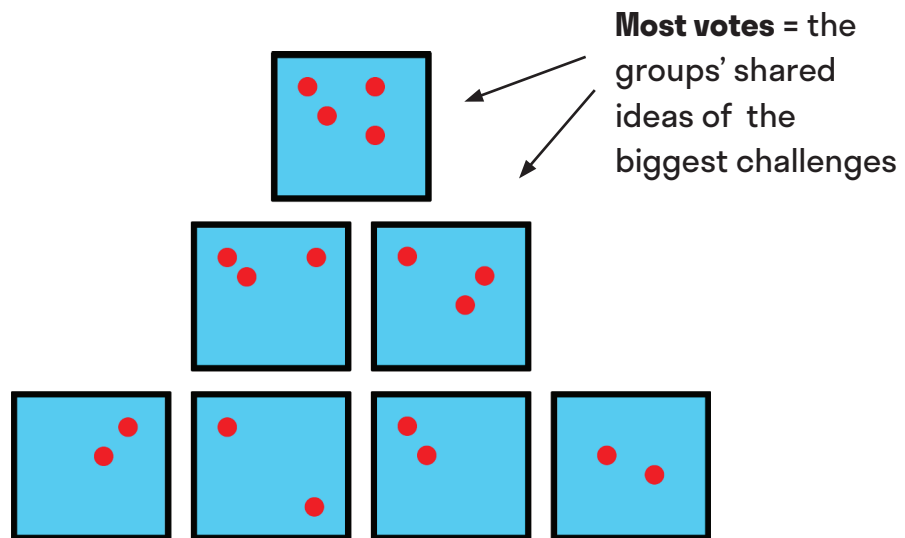
3. Capture the challenges (8 min)

- Using the same color sticky note as you did for the positives, have everyone write challenges about the program's support and for home visitors' workplace wellbeing. Set a timer for 6 minutes.
- This time, everyone comes up to the board at the same time and sticks their notes "under the water" next to the anchor. Again, as many ideas as possible, and don't worry about duplicates.
- This is done without explanation to avoid any personal criticisms. Let the sticky notes speak for themselves. If your group prefers to share out loud as they did in the positives section, that's ok too.
- After the timer goes off, notice and point out to the group if there are many more positives than negatives. Thank everyone for sharing.

03 Running the workshop

4. Dot voting and prioritization (4 min)

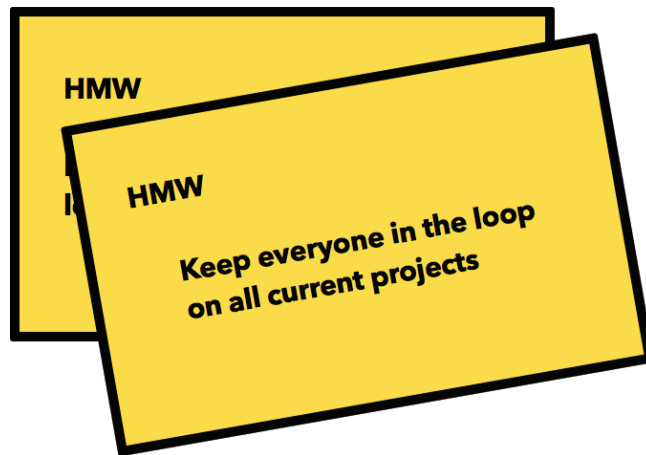
- Give each participant three little red dot stickers and instruct them to vote on what they feel are the biggest challenges without discussion. Duplicate sticky notes can be stacked. Participants can use all three dots on one challenge or vote for three different challenges. Set a timer for 4 minutes.
- When voting is done, rearrange the notes into a column with the highest voted at the top. Notes with the same number of votes should be next to each other.



03 Running the workshop

5. How might we (HMW) (5 min)

- Explain what a HMW is and read the one you wrote out loud. Reframing insight statements as «how might we» questions turn challenges into opportunities for design, and creates a proactive mindset. The HMW format suggests that there might be multiple solutions, while also focusing the design thinking activity on a specific topic.
- Takes the top voted note. If there is more than one top note, take the note to the left or pick two and divide the group to each focus on one. Translate the note(s) into a HMW statement, write it on the large sticky pad (or whiteboard) and post it on the wall.



Every problem is an opportunity for design. By framing your challenge as a how might we question, you'll set yourself up for an innovative solution- - designkit.org

03 Running the workshop

III. SOLVE (60 min)



Current time: _____

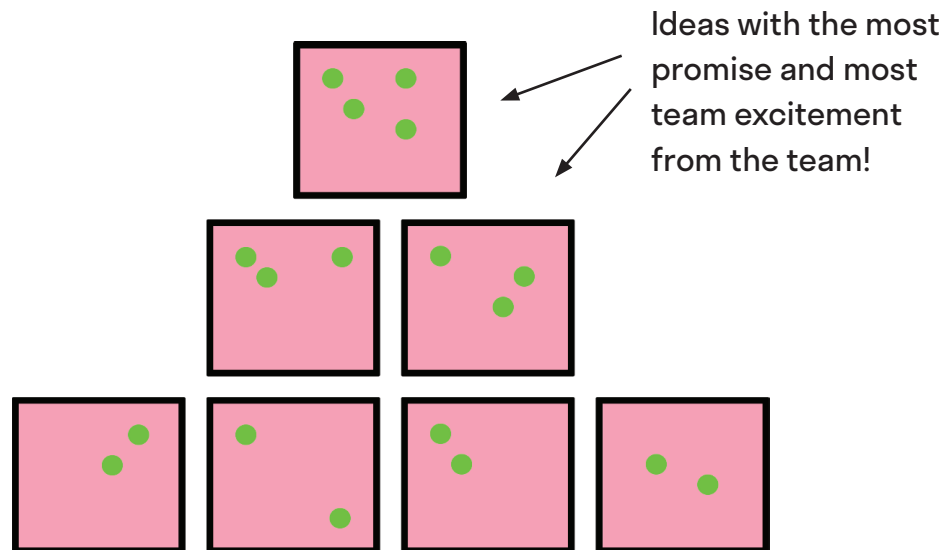
6. Generate solution ideas (20 min)

- Remind the room that there are no bad ideas and that quantity is more important than quality. Let them know they can go wild!
- Using the second color of sticky notes, participants write or sketch as many ideas for solutions as they can in 20 minutes. As each idea is written have them place their sticky notes up on the wall and say them out loud to the group.
- Remind the participants that each note should contain one idea and should not require additional explanation.
- Remind the participants to say “Yes, and...” before they share their ideas to promote positive momentum and acknowledge the idea shared before their own.
- **Note:** If your group is generating ideas about two different HMWs split the group in two, and have each group generate ideas for 10 minutes then switch to the other HMW for the remaining 10 minutes.
- **Facilitation tip:** If your group starts to run low on ideas or get quiet, prompt them with other ways to think about the question by slightly re-phrasing it or asking them to imagine how someone else might try to solve it. For example: How would a tech person solve this? How would a teacher solve this? A coach? An astronaut? A baker?

03 Running the workshop

7. Dot voting (5 min)

- Stack duplicate sticky notes and give each participant six large green dots. Without discussion, instruct the room to vote on what they think are the most promising solutions. Set a timer for 4 minutes.
- Rearrange the notes into a column with the highest voted at the top. Notes with the same number of votes should be next to each other. Notes with one dot or less can be ignored.



03 Running the workshop

8. Effort-impact scale (20 min)



Current time: _____

- Ranking items according to effort by impact will help narrow down to solutions to move forward with. Have the group do this with **the effort-impact scale**: This activity places the top ideas on a grid to highlight which ideas are likely to have a high impact and which might be lower effort to implement. The group will collaboratively place the solutions that were most voted for on this scale. Encourage participants to discuss the reasons for the placement of solutions on the scale as you move through this activity.

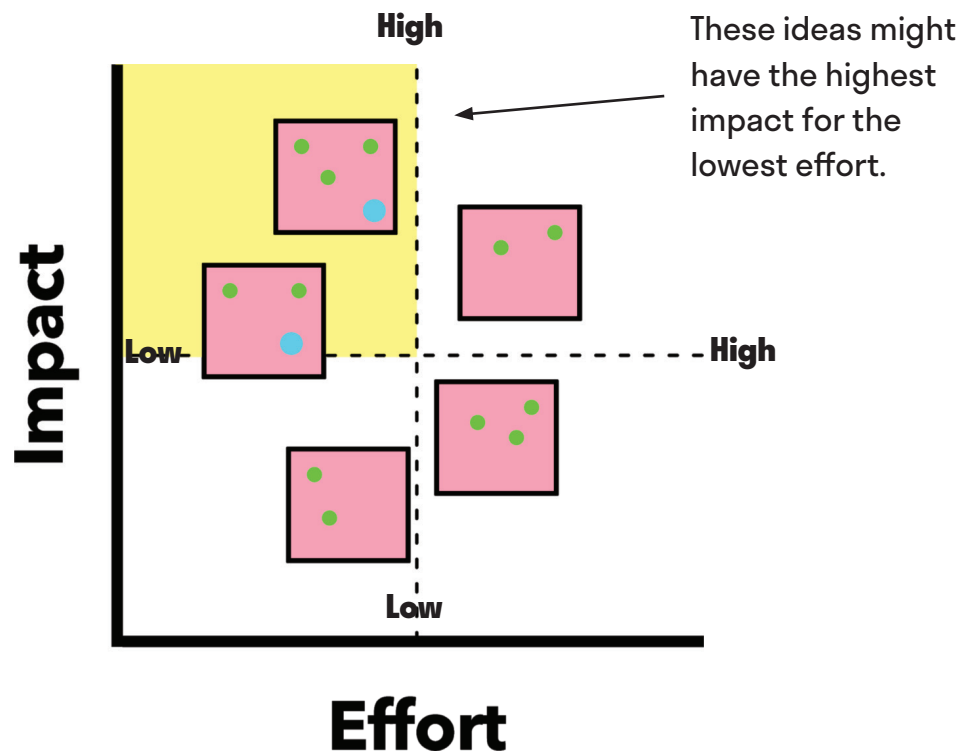
Here are the steps you need to take for this effort-impact scale activity:

- I. Draw the effort-impact scale
- II. Explain to participants what is meant by impact (impact on workplace wellbeing for home visitors and reducing turnover, increasing satisfaction, etc.)
- III. Start with impact:
 - a. Take the top voted solution sticky-note
 - b. Hover it over the center of the effort-impact scale
 - c. Ask “is the impact higher or lower?”
- IV. Move the sticky-note up or down the impact axis until the participants stop saying higher or lower. Often some small discussions break out here. You must be diligent in finding a consensus and stopping any conversations extending past 20 seconds.
- V. Once the impact has been determined, use the same method for effort, saying, “is the effort higher or lower?”

03 Running the workshop

- VI. This time move the sticky-note left or right, until the group stops saying higher or lower.
- VII. Repeat the process for the other top-voted solutions by asking how high or low the potential impact of this solution is and how high or low the effort for this solution would take.

Once the top voted sticky notes have been added to the scale, you'll have something that looks like this:



This matrix gives you a clear overview of which high-impact solutions could be executed and tested very quickly. These solutions are located in the top left-hand corner.

9. Planning experimentation (15 min)

Discuss as a group how one or two of these ideas can be tested at your workplace. Imagine what it might look like to implement this

03 Running the workshop

idea. Assume a timeline of four weeks to implement. If the workshop participants decide that they need a process for improving reflective supervision, potential experimentation could be implementing group reflective supervision meetings for the next four weeks with a review at the end and an opportunity to improve upon or continue this new practice.

IV. REFLECTIVE CONVERSATION, SUMMARY, AND NEXT STEPS (15 min)

Spend 15 minutes allowing the group to discuss the workshop. What parts of the process worked well or did not work well? How do participants feel about the chosen solution? Set a timer for 15 minutes.

Don't forget to communicate thanks and next steps to your participants. For example:

"Thank you for your open, honest, and full participation! Your ideas are powerful tools we can use to improve workplace wellbeing. Next I (the facilitator) will document all of your ideas and summarize them in a debrief document. Then I'll pull together a group of people, including some of you, to make an action plan for how we will gather feedback on and implement these ideas. We will share the plan with you and let you know about each next step.

Great work!"

04 Post workshop

Post-workshop activities and action items:

After the workshop, you (the facilitator) will:

- Take clear photos of anything on the walls including sticky notes or anything written on whiteboards.
- Gather and archive all materials (sticky notes, notes, prototypes, etc.) from the workshop.
- Complete the [workshop debrief worksheet](#). This will help summarize all the ideas and insights that were brought up in the workshop to share with the leadership team and team members who were unable to participate.
- Schedule a follow-up planning session (Step 3: Take Action) within two weeks after the workshop to discuss the workshop debrief, continue the collaboration from the workshop and produce an actionable plan for how to implement one or more of your ideas.

Workshop Debrief Worksheet

Fill out the following worksheet immediately upon completion of the design thinking workshop to summarize the outcome. Use it as a reference when communicating the results of the workshop and as you move forward to Step 3: Take Action.

Design thinking workshop summary:

Date of workshop: _____

Location: _____

Facilitator name: _____

Attendees: _____

Record how many sticky notes* (ideas) were generated in the workshop for:

Number of positives: _____

Number of challenges: _____

Number of solutions: _____

**Count duplicate ideas as one sticky note.*

List some of the positives, or contributors to workplace wellbeing participants shared:

Document the three challenges to workplace wellbeing that had the most dot votes:

1. _____
2. _____
3. _____

Workshop Debrief Worksheet

In three sentences or less, summarize the challenges participants shared:

What was the “how might we” statement used for generating solution ideas? How might we...

Document the three solution ideas that had the most dot votes:

1.

2.

3.

Reflection:

Overall, how do you feel the design thinking workshop went?

Were there differences between the responses and ideas coming from home visitors, supervisors, or other roles or perspectives? If so, what were they?

Did the participants seem surprised by any of their colleagues' responses? How so? Do you think the solutions are attainable? What are possible challenges?

What is one takeaway that the leadership team should know about the workshop?

Step 3



Take Action

Create and implement an action plan.



Step 3

Take action

GOAL:

Identify goals, opportunities, hurdles, timelines, and responsibilities

WHO LEADS:

Delegated facilitator or wellbeing champion

WHO PARTICIPATES:

Home visitors, supervisors, and members of leadership (decision-makers and doers)

TIME COMMITMENT:

1 hour meeting
30 minutes prep for the facilitator

RESOURCES IN THIS TOOLKIT:

Planning session guidelines

Meeting Email invitation template

Guide to running the planning session

Planning session debrief worksheet

PART I: Conduct a planning session

The planning session will continue the collaborations from the previous step and produce an actionable plan for implementing one or more of your design thinking workshop ideas.

The planning session will take on a collaborative and interactive approach, similar to the design thinking workshop. The session includes a set of activities to help you plan and implement the solution from your workshop.

Involve a diverse set of roles and perspectives in this structured planning discussion to help you predict and mitigate risks to executing the solution the design thinking workshop participants came up with. The planning session will document the purpose of the solution and generate a list of realistic action items, responsible parties, and timelines for each item.



Step 3

Take action

PART I: Conduct a planning session

INSTRUCTIONS:

1. Use the 'Invitation to Participate in the Planning Session' email template to invite participants to the interactive planning session. Include the 'Create and Implement an Action Plan' document as an attachment.
2. Use the instructions outlined in the 'Planning Session Guidelines' to prepare and conduct the session.

Planning Session Guidelines:

Prepare:

Preparing is the key to an effective meeting and is respectful of everybody's time. You should prepare one to two weeks prior to the meeting.

Here's a few tips to help you get ready for the session:

- All participants should be present in-person if possible
- Reserve a location that will accommodate all participants, meeting activities, and promotes in-person participation. Consider finding a room that is open, spacious, well-lit, with a whiteboard or enough space to hang large sheets of paper and sticky notes. The location used for the design thinking workshop might also work well for this session.

There are three tasks to complete prior to the planning session:

1. Choose the meeting facilitator
2. Identify and invite participants
3. Review meeting materials including:
 - The guidelines
 - Your design thinking workshop debrief worksheet
 - Pages 38 & 43 of this toolkit on "Design Thinking Defined" and "Workshop Facilitator Guidelines and Best Practices".
 - Review the 'Action Plan Template' (page 82). This document will be filled out by the wellbeing champion after the planning session. By reviewing this document in advance, the facilitator can align the planning session discussion with the points to be identified in the "Action Plan Document".

New Message



To

Cc Bcc

Subject **Join us for a planning session on DAY OF WEEK MM/DD**

Dear [Name],

We are excited to invite you to an hour long planning session to identify action items for implementing the solution we came up with during the design thinking workshop on [MM/DD of workshop]. We hope this solution will help improve workplace wellbeing at [Program Name].

How is it different than the design thinking workshop?

While this meeting follows a similar format to the design thinking workshop and has similar activities for rapid brainstorming, it focuses on identifying and prioritizing next steps. Participants will work together to brainstorm ideas and opportunities, hurdles, and assign responsibilities.

Why are you being invited?

You have been identified as someone who will help move the solution forward and provide valuable input to the planning process. We are conducting planning session to define action items to implement our solution from the design thinking workshop to make program-wide improvements in workplace wellbeing.

Here are the *session* details:

Date and time: [month, date, year; time duration]

City: [City_Name]

Location: [Name and address of location]

Your perspective will ensure that the session is a success and we encourage you to confirm your participation, by replying to this email.

What happens after the planning session?

We will end the planning session with a list of action items and we will divide responsibilities. No preparation or prior experience is required to participate.

Contact [*Wellbeing champion @ email*] with any questions. We look forward to seeing you on *MM/DD!*

Best,

[Your name]

Note: This invitation has been approved by [leadership team member name] at [program name].

[Send](#)[DOWNLOAD EMAIL INVITATION](#)

Materials and checklist

Use this checklist to plan and ensure that you have everything you need for a successful planning session

Supplies:

- Timer
- One black marker (like Sharpie) per person (plus extras)
- Square sticky notes (like Post-it): two colors, about one pad of each color for every two attendees
- Appropriate “thinking” music playlist (positive and high-energy)
- Whiteboards (with markers) or large sticky pads
- Copies of [Create an action plan](#) document

Guide to running the planning session

Below you will find all of the content, information, and materials needed to run the hour-long planning session as a facilitator. Suggested time limits for each step in the planning session are included to keep the meeting within the scheduled hour. Adjust the session as necessary.

I. INTRODUCTION: (5 min)

- a. Describe the goal for this meeting and review the results of the design thinking workshop
 - i. Welcome everyone and thank them for taking the time to attend. Have each participant introduce themselves by name and role as needed
 - ii. Summarize the activities of the meeting and mention that it is a highly collaborative meeting, and participation is a crucial part of the process. For example, you could say:

“This Planning Session is a collaborative hour where people with different perspectives plan how we will implement the solution we decided upon during the design thinking workshop. Today should be fun and creative. We want everybody to feel comfortable and welcome to actively participate. You are here because you have unique experiences and perspectives to share that can help us generate great ideas as we try to improve workplace wellbeing for home visiting staff, which in turn will help us serve the families we work with. We are going to start today by briefly sharing what we accomplished in the design thinking workshop and how we came to that solution. Then we will launch into discussion and activities that will help us focus on how we can execute our solution to achieve workplace wellbeing in our program.”

Running the meeting

- Briefly share the summary of the design thinking workshop using your completed debrief worksheet
 - * Explain that participants generated both positives and challenges.
 - * Restate the “how might we” statement and mention that the group prioritized the challenges according to a vote and then a ranking by both effort and impact.
 - * Describe the solution created in the meeting and any relevant points from the subsequent discussion.
 - * Clarify that during this session participants will not be brainstorming solutions, but rather planning how to implement the solution they already came up with and brainstorming possible opportunities and hurdles.
- Quickly review the ground rules from the design thinking workshop (page 52). The same general rules apply to the planning session.

II. ALIGN FUTURE AND PRESENT VISIONS: (12 min)

1. Ask participants to think about what it would look like to achieve the solution. This could be in the form of what their or others typical day would look like in this improved workplace; a description of a physical object, changes in their home visits or cases, etc. Allow people to think in silence about this for a moment.
2. Open the conversation and ask the room what they envisioned. Start by going around the table but allow others to jump in and add to what someone is saying.

Discuss for 5 minutes. Listen carefully and look for themes and consensus in what the group is saying.

3. Mentally summarize, take notes, and think deeply about what everyone says. At the end of 5 minutes use the whiteboard or sticky pad to write the shared vision where everyone in the room can clearly read it. Ask if everyone agrees with what you've written and discuss any modifications. Once everyone is happy with the statement, move on. Allow 4 minutes.
4. Reverse it! On the whiteboard or sheet of paper to the left of the first statement, with plenty of space in the middle, write a similar statement. This statement should reflect where the program currently stands. Ask if the room agrees and make any modifications. Spend 3 minutes.

III. BRAINSTORMING AND AFFINITY DIAGRAMMING: (20 min)

Affinity diagramming is a method for analyzing qualitative data and is often used in design thinking processes. It consists of using sticky notes and a sharpie to record, organize, and rearrange ideas, giving rise to patterns and themes that might have gone undiscovered with more rigid methods. Both the thick tip of the sharpie and the small size of the sticky note force people to make their ideas as concise as possible, and using sticky notes allows for many rearrangements.

a. Next steps and opportunities (10 minutes)

- i. Using the first color of sticky note with one thought per note, everyone writes “opportunities”. What are some next steps or opportunities we can take advantage of to move towards our future vision? Examples of opportunities could be a team member speaking at an upcoming board meeting or unexpected funding for supplies. Set a timer for 5 minutes.
- ii. There are no bad ideas and the design process emphasizes quantity over quality. Prioritization comes later, but right now the goal is to capture a breadth of ideas.
- iii. One at a time, everyone should stick one of their sticky notes with an opportunity on the wall and start by saying, “Yes, and...”
- iv. Place similar sticky notes near each other.
- v. Place duplicates on top of each other.
- vi. Use the last two minutes to wrap up. Finish by congratulating the group on identifying so many opportunities.
- vii. If there is extra time, explore different ways of rearranging the sticky notes. For example, what needs to happen first, then after that? Or which are easy to do, which are more complex?

b. Prioritization (6 minutes)

- i. Ask the room to consider the sticky note they've shared and to summarize what they came up with.
- ii. Consider effort and impact of opportunities to understand which of the opportunities should not be pursued. Choose both low-hanging fruit and opportunities that may take more time as potential next steps. Use this time to define the timeline for implementing this new solution.
- iii. Eliminate opportunities that are impossible, out of scope, or unrealistic. Move those opportunities away from the others, but don't throw them away or remove them completely.
- iv. Consider the remaining opportunities. Remove those that will not bring the program significantly closer to the end vision identified at the beginning of the meeting.
- v. Determine which of the remaining opportunities are feasible and should be pursued. Move the other opportunities away.

IV. KICKSTART IMPLEMENTATION: (20 min)

a. Identify the players (5 minutes)

- i. Open the room for discussion and identify the “players.” These are people or groups of people who will be involved in achieving the vision by completing tasks, participating in execution, or providing feedback and approval. Start by listing everyone in the room as a player on the whiteboard, add more people or organizations who may need to be involved. It is likely that the supervisor of everyone in the room will be on the list, as well as board members, other decision-makers, and affiliated organizations (if relevant).

b. Round Robin: Action Items (10 minutes)

- i. Arrange the attendees around the table or in a circle. Give them a moment to think, then with a quick rhythm, go around the circle and have each person say one Action Item. Action Items can vary in effort and workload, and examples of Action Items can be anywhere from scheduling a meeting to sending an e-mail, to designing and writing slide decks and presentations.
- ii. Unlike the other brainstorming activities, Action Items should be feasible and actionable within a reasonable amount of time.
- iii. Action items can also include tracking down additional information or resources that may determine the possibility or impact of an Opportunity that might need to be removed at a later date.
- iv. You (the facilitator) will write each action item on sticky notes as they are verbalized.
- v. To add an extra bit of fun, the group can clap a rhythm between each idea to keep the round-robin sharing moving. If someone takes too long and breaks the rhythm, everyone makes a *BZZT* sound, “eliminating” them for that round. They can share when it’s their turn again.
- vi. Continue until everyone is out of ideas for action items.

a. **Setting Obligations (5 minutes)**

- i. Stick the action item sticky notes under the “players” that were written on the board in the “Identify players” activity. Place each action item under the player or players who will be responsible for this action.
 - The room will discuss any conflicts or logistical issues, and mark deadlines on each action item. Action items do not need be assigned to someone in the room, but the amount of time they take will need to be considered as well as deciding who will communicate with them about their obligation.
- ii. Freely add players if the group remembers any that were left out earlier.
- iii. **Project management tip:** Identify deadlines and work backwards. If you want to achieve the vision by the end of the year, what would have to happen and when?

V. CONCLUSION: (3 min)

- a. Ask if everyone is clear on what they need to do and what happens next.
- b. Thank them for coming. For example:
 - i. *“Thank you for your open, honest, and full participation! Your ideas and perspectives allow us to observe our challenge and solution from all angles. Next I will document and summarize the ideas and action plan from this meeting and contact anyone else who wasn’t here today. The first things we will do to implement this solution will be. Great work!”*

Post meeting activities and facilitator action items:

After the planning session:

- Take clear photos of anything on the walls: sticky notes, anything written on whiteboards.
- Gather and archive all materials (sticky notes, other notes) from the session for future reference.
- Complete the Action Plan Template (page 82).
- If your program uses project management software, enter the action items and assign deadlines and people who will complete them.
- Send a summary email and include participants who had an Action Item assigned to them. Make sure people with Action Items who did not attend the meeting are aligned with the purpose and understand their Action Item.

Action plan

After the Planning Session has been completed, the wellbeing champion fills the action plan document with the solutions identified during the planning session.

What

Name the idea:

Describe the idea:

Why

How does it help the home visitors?

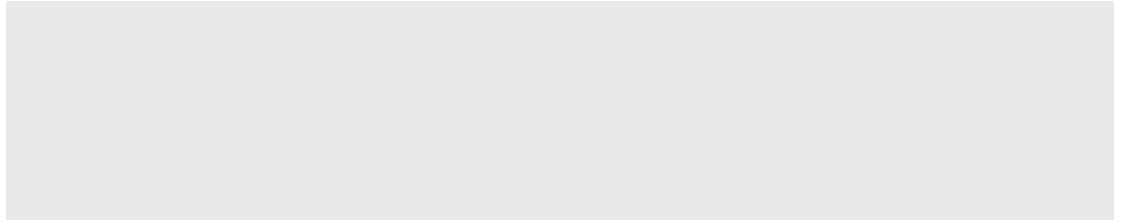
Who

Who is responsible for implementing this?

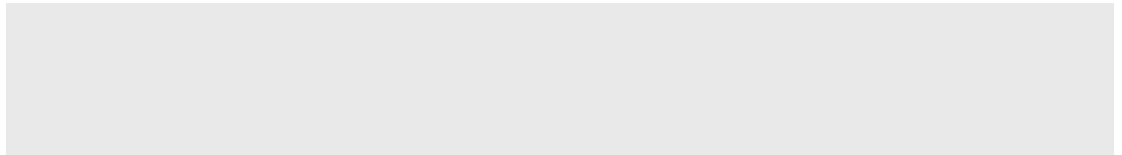
Who will participate?

How

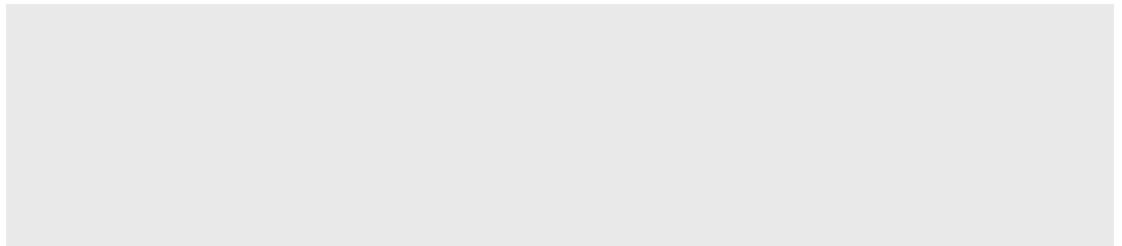
How often will the idea be repeated?
[Daily/ Weekly/
Monthly/ Quarterly/
Bi-Annually]



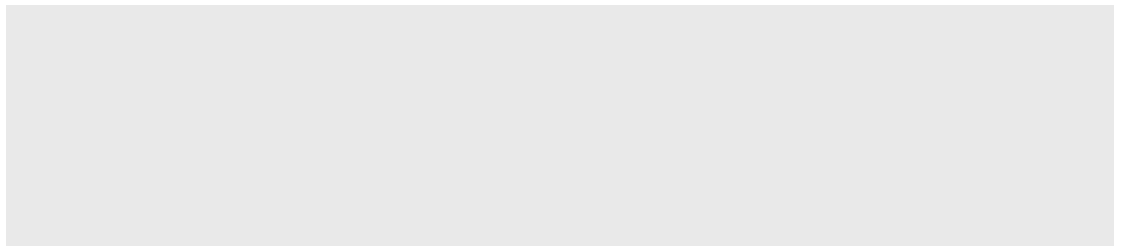
How long will the idea be implemented?



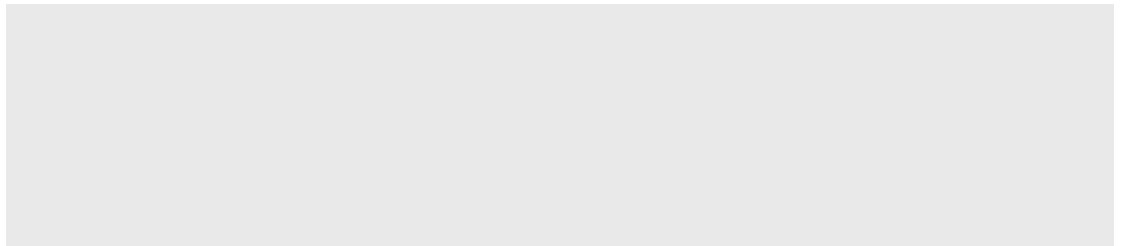
What are the idea's success measures?
- short-term
- long-term



What resources are required for successful implementation?



When will feedback be collected on how this idea was implemented?



**GOAL:**

Review results and identify high priority areas

WHO LEADS:

Wellbeing champion

WHO PARTICIPATES:

Attendees of Step 3:
Generate ideas

TIME COMMITMENT:

1 hour to read and summarize (depending on number of responses)

RESOURCES IN THIS TOOLKIT:

Feedback questionnaire

PART II: Implement and gather feedback

After the action plan has been created and a project leader is identified, the solution is implemented for at least four weeks. Then feedback is gathered to iterate and the solution as needed.

At the end of the four-week period, or longer if needed, the entire program responds to an anonymous questionnaire that asks them what worked well about the solution or initiative, and what could be improved to make it the idea work for them long-term.

This process is ongoing and actively involves program staff in the creation of a new initiative, practice, process, or tool meant to support their own workplace wellbeing. The team will feel empowered by their contributions to improve their work life in ways that make sense for them.



Step 3

Take action

PART II: Implement and gather feedback

INSTRUCTIONS:

1. Initiative lead or wellbeing champion (based on what was decided in the action plan) implements the solution(s) for a period of at least four weeks.
2. After the solution(s) is implemented the
 1. wellbeing champion distributes an anonymous “Implementation Feedback Questionnaire” across the program.
 2. The initiative lead or wellbeing champion share the feedback with the leadership team and program staff.
 3. Incorporate the feedback into the Action Plan.
 4. Repeat Step 3, Part II.

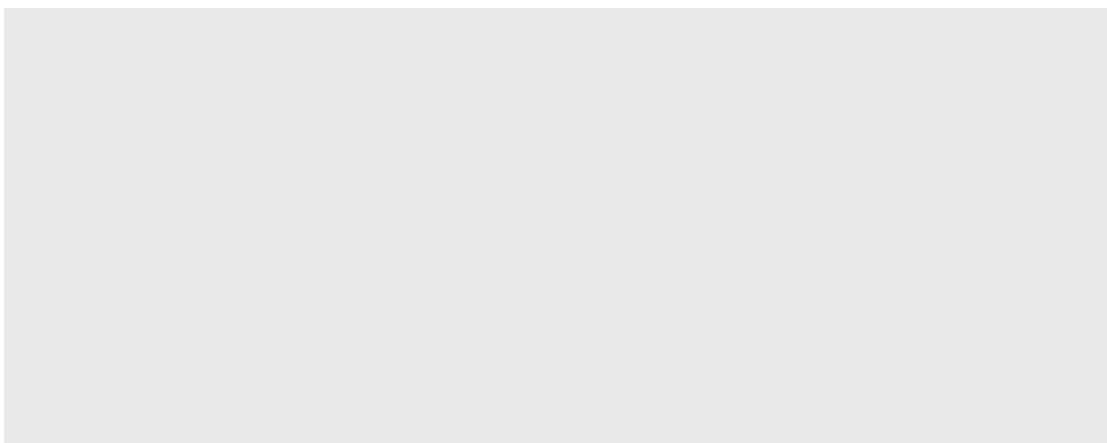


DOWNLOAD THIS FEEDBACK QUESTIONNAIRE

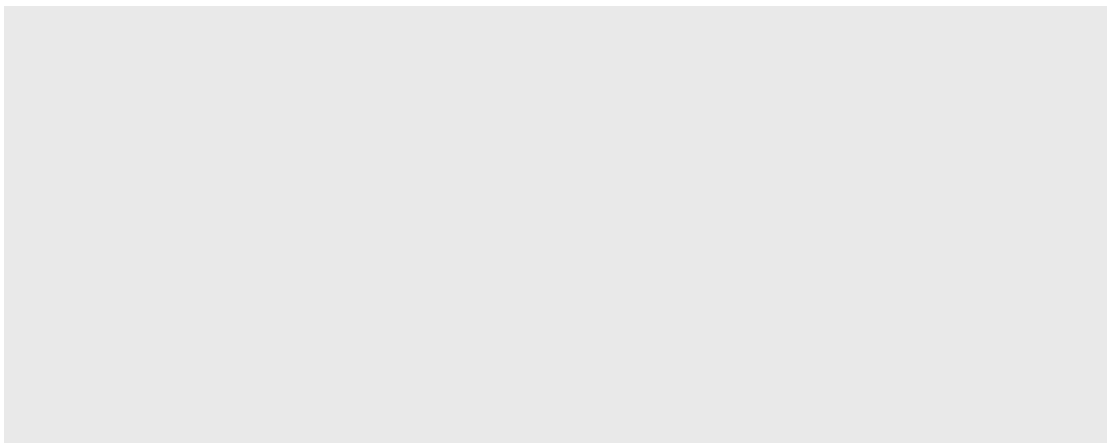
Implementation feedback questionnaire

A new initiative was implemented at our program as a step towards improving workplace wellbeing for program staff [X] [Days/ weeks] ago. We want to hear your feedback on this initiative so we can continually improve.

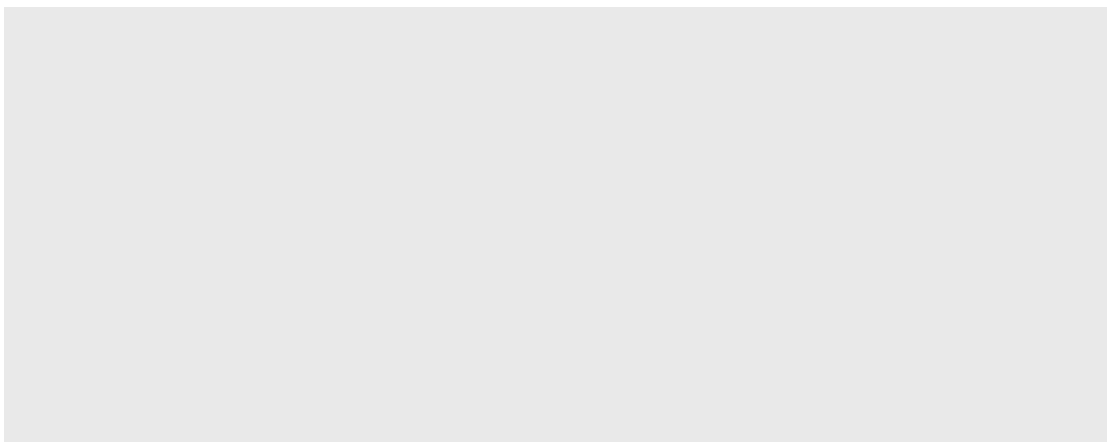
What worked well?



What could be improved?



What could be done differently for this idea to work better in the future?



Congrats you made it!

We hope you continue to use design thinking activities to solve problems collaboratively with your staff.

Improving workplace wellbeing can have a huge impact on you, your home visiting staff, and the families they serve.

This toolkit is a living document that will continue to be updated and improved with feedback from home visiting programs like yours. If you would like to contribute to improving this toolkit, please share your feedback with the organization who has shared it with you.