

Building a Thriving Equine Veterinary Practice: A Culture Transformation Toolkit



TRANSFORMING
EQUINE PRACTICE



What is workplace culture and why is it important in equine practice?

Forbes defines it as “the shared values, belief systems, attitudes, and the set of assumptions that people in a workplace share.”

As a way to define the many aspects of workplace culture, there are 7 pillars that can provide a scaffold onto which equine practices can build a more positive workplace environment for employees and owners.

“Organizational efforts to invest in workplace well-being, as well as in local organizations and community development, can in turn support the development of a happier, healthier, more productive workforce and contribute to the success and economic well-being of an organization.”

—Office of the US Surgeon General

Highlights of Excellence within the Pillars

Non-Salary Benefits

- Create benefits packages that attract and retain talented employees by supporting their needs
- Obtain information from current employees about their usage and understanding of the support that is currently offered

Physical & Mental Safety

- Enhance psychological safety and mental well-being among employees
- Where possible, decrease the inherent physical risks of equine practice

Connection & Community

- Foster collaboration and teamwork
- Champion the benefits of belonging to organized veterinary medicine groups

Mattering at Work

- Understand what motivates and inspires individuals
- Develop recognition opportunities for employees' contributions

Professional & Personal Life

- Understand that work-life balance looks different for every individual and support their goals
- Help all team members develop autonomy in their role

Communication

- Create clear boundaries for communication within the team and with clients
- Create and protect designated time for open communication amongst team members

Opportunities for Growth

- Cultivate mentorship and onboarding programs to develop strong team members
- Create opportunities that will increase employee engagement

7 Pillars that Contribute to a Positive Veterinary Workplace Culture

Non-Salary Benefits

Physical & Mental
Safety

Connection &
Community

Mattering at Work

Professional &
Personal Life

Communication

Opportunities for
Growth



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Build A Thriving Veterinary Practice: The Why Behind Workplace Culture

There is no blueprint for creating a positive workplace culture within veterinary medicine. Every veterinary practice is unique. The ultimate goal is to create a culture where people want to come to work, feel valued, and enjoy their contributions. While all members of the team are responsible for leaning into these behaviors, clinic leaders are ultimately responsible for modeling the change they hope to create in their team's culture. As a practice owner or manager, identifying areas that present a risk to the culture of your organization can be daunting, and many times, the thought of change can be overwhelming. The commitment to fostering a positive practice culture will best be demonstrated not in words or policies but in the leadership's daily actions.

While the factors contributing to a successful practice culture have been categorized into 7 pillars, these concepts are not meant to be stand-

alone silos. A practice that successfully navigates one or two pillars but ignores others cannot expect to obtain a successful and sustainable culture. The practices that succeed in all areas of cultural improvement will create competitive environments to attract and retain the brightest and the most inspired veterinarians and veterinary staff. An empowered team operating in a positive work environment is more likely to be highly engaged, with improved retention and impact.

Data indicates that veterinarians rank monetary compensation below workplace culture and the ability to cultivate a fulfilling life outside of their jobs. Respect for each team member is crucial when considering change that leads to a more positive workplace environment. Integration of all of the pillars of workplace culture outlined here will lead to greater individual employee fulfillment and financial success for the practice.

As the Practice Culture Subcommittee of the AAEP Commission on Equine Veterinary Sustainability, we hope that the detail in this toolkit will help equine veterinarians better understand workplace culture and seek to implement these tools to improve equine practice. For each pillar, the commission has developed a variety of resources that can help you make positive changes for the long-term benefit of your practice, your staff, your clients, and your patients. You will see the interwoven nature of the pillars as you dive deeper into how you can begin to impact both your practice and the profession as a whole, by improving the culture within your workplace.

Non-Salary Benefits

Providing excellent employee benefits can increase employee loyalty, boost recruitment efforts and show employees that leadership cares about employee well-being. Non-salary benefits play an important role in day-to-day job satisfaction. What's more, the absence of non-salary benefits can increase employee turnover. Studies show that more than half of the US workforce has left a job after finding better benefits packages elsewhere. One way to stand out in a competitive hiring environment, is to provide outstanding employment benefits.

The needs and goals of equine veterinarians have evolved, and will continue to change over their lifetime. A one-size fits all package is not likely to be the best plan for the entire team. While a practice may not be able to fulfill each employee's desires, receiving input from potential hires and getting feedback from current team members is an actionable way to improve employee engagement.

Tools to Transform Your Practice:

Leaders can best understand what benefits their employees value most using an employee benefits survey. A basic template has been created for practices to utilize with both potential employees and current employees. It can be tailored to the options that you currently offer while also leaving room for creative new ideas that may not add a large cost to the practice. These surveys can also provide feedback on whether or not employees are actually aware of all the benefits they have available to them. See pages 15-16.



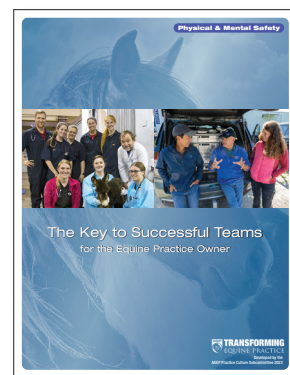
Physical & Mental Safety

It is essential for employees to feel both physically and mentally safe at work. The practice should prioritize both within their team. Providing physical safety for employees involves reviewing concerns and establishing policies with regards to workplace hazards, OSHA regulations, and physical or verbal harassment or discrimination. In equine practice, ensuring adequate patient restraint and skilled help during procedures is essential to minimize physical risk to veterinarians, staff, and clients. Providing a positive example of prioritizing mental wellness and self-care is another important aspect of developing a healthy workplace culture. Leadership can model promoting healthy habits by actually taking time off and setting boundaries around contact during off hours. Ensuring that team members believe that emergency coverage is being shared equitably amongst those in the practice is yet another important aspect to consider.

Team cohesion and psychological safety are also crucial to creating a healthy workplace culture. When psychological safety is high, employees feel safe to speak up, share ideas, and admit their mistakes without fear of punishment or retaliation. In a psychologically safe practice, the focus is on learning and growing as individuals and everyone contributing to improved overall team performance.

Tool to Transform Your Practice:

Practices should strive to create opportunities for genuine engagement with their teams, especially in ways that are positive, collaborative, and outcome oriented. The *Key to Successful Teams* workbook will allow equine practice owners and managers to understand the profound impact that improved psychological safety will have on employee engagement and performance. See pages 17-20.



Connection & Community

The innate need for connection and community applies to practice leadership, associates, and support staff. A thriving practice culture cultivates trusted relationships centering around inclusivity, teamwork, and belonging. Encouraging connectedness within a practice and into the broader community within which it sits, will combat isolation and loneliness, as well as improve the mental and physical effect of all workers and ultimately, the prosperity of the practice.

The effects of working within a silo are suboptimal physical, mental, and practice health. Working within a broader network of practices and the greater community optimizes a personal and professional legacy. Whether building a solo practice from scratch, growing a smaller practice to a larger one, or reflecting on improving benchmarks for a seasoned practice of any size; it is important to foster collaboration and teamwork both internally within the practice and externally within the broader community.

Tool to Transform Your Practice:

Watch this video *Building Connection & Community in Equine Practice* today; better yet, watch it with your team, together! You will see personal examples of how community and connection have affected several of our colleagues in their journey as equine veterinarians.



Mattering at Work

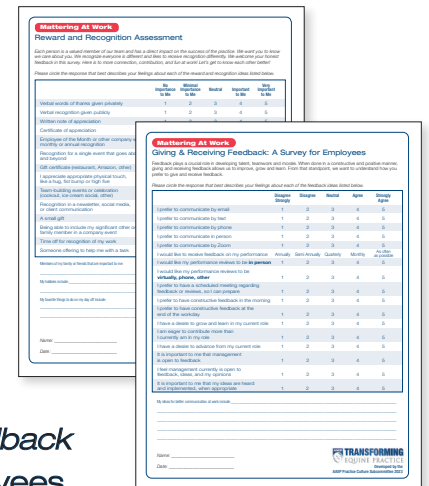
People do better at work and in life when their contributions are recognized and rewarded. People want to know their work is meaningful and they are valued. While getting paid for one's work is important, veterinary professionals want more from their work than just a paycheck. They want to contribute, make a difference in the lives of others, and know they matter; both personally and professionally. Surveys indicate that employees, especially new graduate veterinarians, want more than just fair financial compensation. They want to work in an environment where their work is impactful, they are valued as individuals and their life outside of the workplace is protected and supported. Within this broader pillar of mattering at work, the U.S. Surgeon General has identified the following components:

- Providing a living wage
- Engaging workers in workplace decisions
- Building a culture of gratitude and recognition
- Connecting individuals to the organization's mission

It is vital to have workplace mission, vision, values and goals that are embraced by all, perhaps even created collectively. Helping employees connect their individual work to the organizational mission can generate pride, fuel motivation, and decrease stress. Positive feedback and recognition are beneficial to the individual and, ultimately, to the organization. Ideally this approach will lead to greater retention and lower attrition. In addition, creating a positive workplace environment leads to better performance, increased motivation and happier staff and clients.

Tools to Transform Your Practice:

It is important to provide recognition to your employees and team members, and to learn how an individual likes to be recognized and rewarded. Recognition comes in many different forms and every person receives recognition differently. Regular, honest recognition is important in order to increase employee satisfaction and a sense of pride in knowing their contributions are valuable to the organization. Utilize the *Reward and Recognition Assessment* and *Giving & Receiving Feedback* surveys to help you learn how to recognize employees and provide and receive feedback. See pages 21-22.



Professional & Personal Life

The blur between personal and professional life creates a challenge for many professionals, but few professions can compare with the pressures faced by equine veterinary teams. At the heart of the challenge is that our profession's deep, emotional connection to our patient and to our client is real, because as equine veterinarians we consider ourselves horse people, too. Setting boundaries with clients can be especially difficult because of our close relationships created by shared passion, but establishing and maintaining boundaries is critical to prevent burnout. While these guidelines for how we interact with the world must be interpreted and acted upon at a personal level, there should also be adoption of a practice-wide standard, respected by all. With the safety of knowing that everyone is adhering to the same basic principles, associates can feel more comfortable establishing their own individual boundaries.

One of the keys to employee satisfaction rests on the basic human need for autonomy and flexibility. The successful organization sees workers not only for the work they provide, but as a whole person. Practices that facilitate their employees' ability to have control over how and when they work will increase the retention of these professionals and ensure their job satisfaction. What this looks like may vary widely between individual workers.

Tool to Transform Your Practice:

Creating harmony between one's personal life and career is a crucial aspect of any caregiving profession, and the equine veterinary field is no exception. Learn about the key components of *Work-Life Integration* to help you and your team members achieve greater personal and professional harmony. See page 23.



Communication

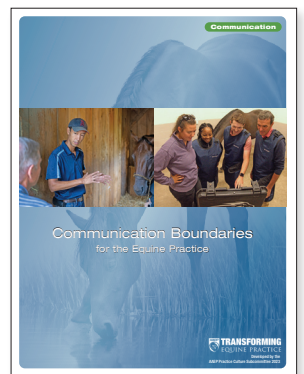
Communication is the foundation of our day-to-day interactions with our colleagues. There are multiple ways we communicate with each other, including the words we use, the tone of our voice, our body language, and written communication through texts, e-mails, and notes. The sum of all of our communication methods lets teammates know what we think, what we need, and how we feel. Clear, honest, and open communication is reassuring to those around us and allows the team to have well-defined expectations. How we communicate can affect our interpersonal relationships and ultimately strengthen or erode a practice's culture if we are not aware of the "emotional wake" we leave on others. Think about a recent interaction with someone in your practice. After that interaction did you leave people feeling optimistic, heard, valued, and appreciated? Or did you leave colleagues feeling confused, disrespected, devalued, and frustrated?

Ideally, we communicate with our colleagues to move towards a solution and to strengthen the connections we have between team members. Time set aside for intentional gathering and sharing of ideas is vital to the health of the team. Listening is a crucial part of effective communication. Listening to learn and understand while others are speaking rather than waiting for our turn to speak is a great starting point. Reflective listening is even better, such as when we verbalize a brief summary of what we heard back to the speaker to ensure that we have understood them correctly. Responding to new ideas with curiosity rather than defensiveness can encourage team members to share their opinions and challenge norms creating new ideas for the benefit of the practice.

Tool to Transform Your Practice:

Practices should strive to create opportunities for genuine engagement with their teams, especially in ways that are positive, collaborative, and outcome oriented. The *Communication Boundaries for the Equine Practice* guide gives step-by-step recommendations for driving conversations about boundaries with your team and clients.

See pages 25-30.



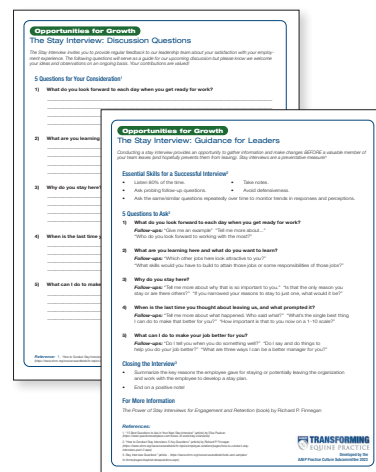
Opportunities for Growth

Opportunity for growth rests with the human need for learning and accomplishment. Learning is the process of continually acquiring new knowledge and skills, which ultimately provides room for individual intellectual, social, professional, and emotional growth. While learning is the process of growth, accomplishment is the outcome of meeting defined goals and achieving impact. Accomplishment confers a recognition of competence that reduces stress, anxiety, and self-doubt. Without learning or working towards shared goals, individuals can start to feel stagnant, frustrated, and ineffective. When practices create opportunities for learning, accomplishment, and growth, individuals become more optimistic about their abilities and more enthusiastic about contributing to the whole.

Common opportunities for growth in a practice include offering quality training, education, and mentoring; fostering clear, equitable pathways for career advancement; and ensuring relevant, reciprocal feedback. Training may be focused on increasing skills within the practice setting or can be provided by support to attend continuing education outside of the practice. Practices can informally promote growth opportunities by showing genuine interest in workers through personal encouragement, coaching, and mentorship of their interests. Relevant, reciprocal feedback by leaders can provide guidance to help employees consider their strengths and areas for growth.

Tools to Transform Your Practice:

In order to foster opportunities for growth within your own practice, a clear outline of expectations around opportunities for growth is necessary. This includes thorough onboarding of new employees with benchmarks and proactive follow up, continued training and education, and mentoring plans. To help you understand the needs of your team, utilize the *Stay Interview* templates as an easy way to get started. See pages 31-32.



Resources for Your Practice

Scan to access digital versions:



Tool: Guide to Practice Culture Assessment

This rubric—shown on pages 13-14—is a guide which practice owners and potential employees can use to assess and evaluate a clinic. The rubric is designed to help practice owners understand how their clinic is doing regarding culture, staff development, and overall success. At the same time, it can be used by potential employees to gauge a practice's culture and determine where they will best fit for long-term success.

Guide to Practice Culture Assessment

Welcome to this rubric guide, which practice owners and potential employees can use to assess and evaluate a clinic. The rubric is designed to help practice owners understand how their clinic is doing regarding culture, staff development, and overall success. At the same time, it can be used by potential employees to gauge a practice's culture and determine where they will best fit for long-term success.

This rubric allows practice owners and potential employees to work together to ensure a positive and successful working environment.

Follow the 7 pillars of a positive workplace culture as this rubric moves from most to least desirable characteristics.

Non-Salary Benefits	Physical & Mental Safety	Connection & Community
<p>5</p> <p>Comprehensive health benefits. Vacation time/personal days are negotiated to meet individual needs. Short & long-term disability insurance. Paid parental-leave policy. Contribute to retirement plan with % matching.</p>	<p>Mistakes and concerns are openly shared and are seen as growth opportunities. Trust established amongst staff/colleagues. Leadership emphasizes and models importance of time away from work. Dedicated support for all aspects of practice (appointments, scheduling, prep, follow-up). ER coverage is shared fairly and with staff input.</p>	<p>Have a network within the practice as well as with the external professional community. Feel a sense of belonging. Part of a community where each individual matters and where everyone is trusted. Welcoming and helping others.</p>
<p>4</p> <p>Good health benefits. Adequate vacation/personal days. Disability policy. Parental leave policy. Contribute to retirement plan with % matching.</p>	<p>Mistakes and concerns are heard and acted upon. Strong trust exists within most of the team. Leadership emphasizes importance of time away from work. Dedicated support for appointments. ER coverage is shared fairly.</p>	<p>Recognition of the value of others in the practice and conscious effort to foster collegial relationships. Invites external networking within the profession and actively promotes engagement and trust.</p>
<p>3</p> <p>Average health benefits. Adequate vacation/personal days. Disability policy in place. Parental leave is an option but not established policy. Contribute to retirement plan.</p>	<p>Mistakes and concerns are heard, but not acted on. Strong trust exists within parts of the team. Leadership does not encourage personal time. Intermittent support staff available for appointments. Physical safety is said to be a priority. ER coverage is shared fairly.</p>	<p>Develops relationships both within and outside the practice without stewardship and initiative. Practice environment tends to be guarded and relationships are based on cliques.</p>
<p>2</p> <p>Some health benefits. Some vacation/personal days. +/- disability policy. No parental leave policy. No retirement plan.</p>	<p>Team members afraid to share mistakes or concerns. Lack of trust or engagement amongst team. Leadership does not encourage time away from work. No dedicated support staff for appointments. ER coverage schedule lacks employee input.</p>	<p>Connected in name only—acts as equal partners relative to practice equity, however underlying behavior is not consistent with foundational trust and daily interaction. Collegiality is based on familiarity not depth.</p>
<p>1</p> <p>No health benefits (medical/dental/vision/mental). Few vacation/personal days. No disability insurance. No parental leave policy. No retirement plan.</p>	<p>Team members afraid to share mistakes or concerns. Lack of trust or engagement amongst team. Leadership discourages time away from work. No support staff. Inequitable ER coverage.</p>	<p>Acts individually in the practice or the community. Goes to work and performs with no or minimal connection to others or time for external organizations and opportunities.</p>

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Developed by the AAEP Practice Culture Subcommittee 2023

Guide to Practice Culture Assessment, *continued*

	Maturing at Work	Personal & Professional Life	Communication	Opportunities for Growth
5	<p>The practice provides consistent & regular recognition for contributions, allows employees to contribute in ways that support their passions, includes employees in decision making and provides regular, structured performance reviews semi-annually to annually. The practice has established and clearly articulated mission & vision statements and core values which they model and they strongly align with your own mission, vision and core values. You feel aligned with the environment, your contributions matter and this is a place you could see working at for years to come.</p>	<p>Employees have full autonomy to set schedule which aligns with desired working hours. Practice-wide modeling that access to veterinarian is limited to structured communication channels and non-work time is respected by all.</p>	<p>Inter-personal collaborations are consistently characterized by body language and tone of voice that invites interaction. Conversations result in clear expectations that are directly outlined in the moment. Team members are able to voice opinions, offer ideas, challenge norms, and actively listen. Formal opportunities for collaboration exist including regular staff/doctor meetings, case rounds, reviews and check in's.</p>	<p>Thorough onboarding with clear expectations, benchmarks and proactive follow-up. Regular continued training and education. DVM CE allowance (unlimited fees and travel) + dedicated time off for CE travel to support a national CE event or advanced training program. Formal mentoring plan exists and scheduled conversations regularly happen. Opportunities for career growth to expand leadership and clinical skills are championed by the practice.</p>
4	<p>The practice provides recognition for contributions, includes you in decision making, and provides performance reviews. The practice has established mission & vision statements and core values and they align well with yours.</p>	<p>Employees have autonomy of daily schedule that provides for consistent time off and is rarely overloaded. Most team members actively set boundaries and respect nonwork time.</p>	<p>Inter-personal collaborations are usually characterized by body language and tone of voice that invites interaction. Conversations result in clear expectations. Regularly scheduled opportunities for collaboration that include staff meetings and doctor meetings.</p>	<p>Adequate on-boarding with some measurable metrics and basic follow-up. Inconsistent training opportunities. Formal mentoring plan exists and scheduled conversations often happen. Opportunities for career growth to expand leadership and clinical skills are encouraged by the practice. DVM CE allowance to support national CE Event (all expenses) every year.</p>
3	<p>The practice provides some employee recognition or opportunities for contribution. The practice inconsistently provides performance reviews. The practice has established mission & vision statements and core values and they adequately align with yours.</p>	<p>Employees have schedules that are sometimes overloaded, but offer predictable time off and some autonomy for adjustment. Inconsistent application of boundaries across the team based on individual clients and veterinarians.</p>	<p>Inter-personal collaborations are sometimes characterized by body language and tone of voice that invites interaction. Awareness of one's emotional state exists but is not consistently addressed. Formal monthly staff meetings.</p>	<p>Basic on-boarding plan, training and growth opportunities exist but follow-up is lacking. Mentoring is discussed and sometimes happens. DVM CE allowance to support national CE Event (all expenses) every other year.</p>
2	<p>The practice inconsistently provides employee recognition or opportunities for contribution and provides performance reviews only when initiated by employee. The practice has established mission & vision statements and core values that align with a few, but not many of yours.</p>	<p>Employees have minimal autonomy and boundaries are disrespected. They are expected (by the practice and clients) to always be available. Consistently work more than desired hours.</p>	<p>Interactions are largely problem focused characterized by negative body language and tone of voice with rare solution outcomes. Emotional state leaves team members feeling confused, frustrated, ineffective and without clear direction.</p>	<p>Informal on-boarding with no further training. Mentoring and growth opportunities are discussed, but rarely happen. DVM CE Allowance to support regional CE Event or Membership.</p>
1	<p>The practice does not provide feedback or recognition. The practice or owners may even consistently provide feedback in a non-constructive or negative way. The practice does not have established mission, vision statements nor defined core values.</p>	<p>Employees have no scheduling autonomy. They are expected (by the practice and clients) to always be available. Consistently work more than desired hours.</p>	<p>Interactions occur rarely and are characterized by negative body language and disrespectful tone of voice. Decisions are directed, with no listening or two-way communication. The emotional state leaves team members feeling confused, demoralized, unheard, devalued, disrespected.</p>	<p>No training, mentoring or skill expansion opportunities. No CE allowance in dollars or time.</p>

Non-Salary Benefits

A Survey for Current & Potential Employees

Non-salary benefits play an important role in day-to-day job satisfaction. Practice owners and managers can utilize these questions to ascertain which non-salary benefits are most important/attractive to potential or current employees.

Current Employees

Response options:

	Not Offered	Disagree Strongly	Disagree	Neutral	Agree	Strongly Agree
1. I am satisfied with the level of health insurance from my employer.	NA	1	2	3	4	5
2. I understand how to fund my retirement account.	NA	1	2	3	4	5
3. I feel confident that my retirement account will allow me to retire comfortably.	NA	1	2	3	4	5
4. I understand my option to have student loan reimbursement from my employer.	NA	1	2	3	4	5
5. Having childcare support from my employer makes it easier to do my job.	NA	1	2	3	4	5
6. My employer offers generous parental leave.	NA	1	2	3	4	5
7. I understand my employer's parental leave package.	NA	1	2	3	4	5
8. I feel confident that I can take time off when I am sick.	NA	1	2	3	4	5
9. My employer's paid time off allowance is generous.	NA	1	2	3	4	5
10. The snacks provided at work are awesome and helpful to my day.	NA	1	2	3	4	5
11. I am satisfied with the options to have health and wellness memberships covered by my employer.	NA	1	2	3	4	5
12. I feel comfortable asking for time off.	NA	1	2	3	4	5
13. The practice encourages me to utilize my paid time off and I feel that I have enough time to care for myself.	NA	1	2	3	4	5
14. I am supported in my efforts to continue learning and developing my clinical skills.	NA	1	2	3	4	5
15. I am able to attend the CE meetings of my choice every year.	NA	1	2	3	4	5
16. My current set of non-salary benefits fits my needs well.	NA	1	2	3	4	5

If your needs are not being met, what is one small change the practice can perform to better support you?: _____

17. Have you read or heard about any interesting initiatives related to benefits you would like to bring to our attention?

Survey questions for potential employees located on reverse side.

Name: _____ Date: _____



Potential Employees

The following benefits are important to me:

	Disagree Strongly	Disagree	Neutral	Agree	Strongly Agree
1. Health insurance	1	2	3	4	5
2. Retirement account option Preferred type: _____	1	2	3	4	5
3. Student loan reimbursement	1	2	3	4	5
4. Equity or ownership potential	1	2	3	4	5
5. Profit sharing	1	2	3	4	5
6. Childcare resources	1	2	3	4	5
7. Parental leave	1	2	3	4	5
8. Food services and snacks	1	2	3	4	5
9. Gym reimbursement	1	2	3	4	5
10. Mental healthcare support or stipend	1	2	3	4	5
11. Phone reimbursement	1	2	3	4	5
12. Time off - paid and unpaid	1	2	3	4	5
13. CE allowance List amount or specific meeting: _____	1	2	3	4	5

Name: _____ Date: _____

For additional resources for use in your practice, visit aaep.org





The Key to Successful Teams for the Equine Practice Owner

 **TRANSFORMING**
EQUINE PRACTICE

Developed by the
AAEP Practice Culture Subcommittee 2023

Fostering a Sense of Safety and Belonging Can Transform Your Team

Have you ever felt like you couldn't ask a question or suggest a new idea? Have you ever been reluctant to ask for help with a case? Do you feel hesitation when sending a case history and radiographs to a specialist? Is there a time when you were afraid to admit that you made a dosage mistake for a patient?

We've all experienced these feelings in veterinary school and in practice. Think back to a time in veterinary school when you asked a question in rounds, only to be humiliated in front of your classmates. Or perhaps more recently you were chastised by your boss for not offering to perform an MRI on a lame horse.

What's holding us back?

The fear of judgment, humiliation, and punishment from our superiors and peers can be paralyzing. These fears hold us back; decreasing our confidence, our willingness to develop new skills, our productivity, and

our satisfaction in the work we do. When fear holds us back from speaking up, it's often due to a lack of psychological safety in our work environment.

What is Psychological Safety?

Creating and leading an effective team is one way to focus on a positive practice culture. According to research, team effectiveness is driven by one major factor in the workplace - psychological safety.

Psychological Safety can be defined as the belief that you won't be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes.

At the practice level, it's a shared expectation held by members of a team that teammates will not embarrass, reject, or punish them for sharing ideas, taking risks or soliciting feedback.



What it is not.

Psychological safety does not mean that there is a lack of accountability!

It is not about decreasing the standards to which you hold your employees. In fact, once team safety has been established, the opposite is true. Instead of walking lightly around someone's feelings, when there is an atmosphere of established psychological safety, candid discussions can be held more easily.

Why is it key to changing our team dynamics?

A lack of psychological safety within the practice presents risks to the business.

Retention

If employees do not feel a level of safety within their team, you are not going to hear about it. You are going to feel it as they leave to find new positions. Employee turnover takes profit out of your bottom line and significantly detracts from clinic morale.

Status Quo

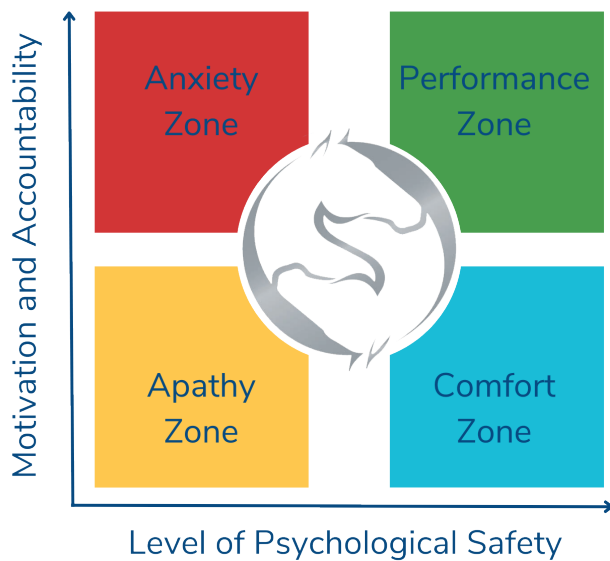
Practices miss out on opportunities to grow and improve when employees are afraid to share what isn't working and to offer new and innovative ideas.

Failures

When people don't feel safe to admit their mistakes it can lead to poor outcomes like patient fatalities or worker injuries, repeated errors or omissions in patient care and poor customer service.

Team Performance

When describing the relationship between psychological safety and accountability, Dr. Amy Edmondson, a leading expert on team leadership and psychological safety, describes four zones.



The Performance Zone combines both high standards and high psychological safety.

A veterinary team that had reached this level has created a work climate where candor is allowed and expected, mistakes are forgiven, asking for help is not seen as a weakness and questioning current norms can occur without fear.

This is where we want our practice team to exist!

**Adapted from research by Dr. Amy Edmondson*

How can practice leaders create psychological safety?

Lead by example.

If you want others to share learnings, untested ideas and mistakes, leaders must be also be vulnerable.

Establish your “why”

Why does the practice exist? What is the value the practice brings to your patients, your clients? Make sure everyone in the practice understands the “why”. Each individual needs to feel that their contribution is vital to the team, the practice, the patients, and the clients. Employees need to feel that they bring value to this mission.

Create space for discussion

Employees need access to you in order to share, brainstorm ideas and ask questions. This time should be carved out separate from staff meetings with packed agendas. Generally, our busy schedules often don't allow time for discussion or reflection so this needs to be intentionally planned into your schedule.

Ask open-ended questions

What's working? What's not working? What am I missing? What don't we know? Don't mistake silence for agreement...ask more questions. Avoid questions that invite expected answers such as: “The new on-call schedule seems good right?”

Encourage healthy feedback

Feedback sessions between practice leaders and employees should occur regularly. Feedback should be viewed by both the leader and the employee as a learning conversation. Recognize that your view as a leader is limited—you don't see the whole picture. Encourage thoughtful input from the employee by being receptive and utilizing what you hear.

Benefits

Once a culture of psychological safety has been established, team members often begin to feel more engaged, innovative, and productive.

You will see increases in:

- Positive patient outcomes
- Client satisfaction
- Team performance goals
- Creative idea suggestions
- Employee well-being

These positive benefits will lead to better employee retention, increased profitability and a new level of team cohesion.

Specific Examples

Here are a few examples of how different types of practice leaders can start to establish a culture of safety within their teams:

Demonstrate engagement

During weekly team meetings, you need to ask follow up questions, offer input and be interactive to demonstrate that you are truly listening to any concerns that are brought up during the meeting.

“How can I support you?”

Show understanding

When a problem is brought to a veterinarian’s attention (owner hears from associate vet or associate vet hears from technician), you need to recap what you’ve just heard and validate that you understand how that issue could be causing negative feelings.

Promote self-awareness of the individuals on the team. Learning how we each prefer to think, communicate, and behave allows for improved communication among team members.

Tools such as DISC and 360 reviews are a great way to understand ourselves and each other better.

“I can see that this is really rubbing you the wrong way. Any thoughts on how to improve it?”

Be inclusive in interpersonal settings

A practice owner must be available and approachable. You can set specific office hours where drop-in visits are encouraged or you can set aside time to meet with employees individually.

A veterinarian could also share information about how to best communicate with them.

“I do great with email but have a hard time processing face-to-face meetings without a little bit of prep.”



Expressing gratitude for the team’s contributions is also crucial during group gatherings. Take this time to be specific and encourage others to share their wins as well.

“You are doing really well in this specific area. I appreciate how you’ve aided the team this week.”

Be inclusive in decision-making

Take the entire team’s opinion into consideration when making decisions that have clinicwide effects. You won’t always be able to please everyone but team members will feel heard and understood if you give them your full attention.

Provide multiple channels for employees to share their thoughts – not everyone is comfortable speaking up in meetings. Try Slack, email or one-on-one sessions.

Make sure to ask this question often - *“What are we missing?”* Be sure to actively pause and wait (*count to 10*) before moving on!

Show confidence and conviction without appearing inflexible

Acknowledge your own mistakes, either medical errors or missteps as a practice leader.

Sharing times when you’ve gotten it wrong will make employees more likely to ask questions, seek help, and report their own mistakes.

ADDITIONAL RESOURCES



aaep.org

Mattering At Work

Reward and Recognition Assessment

Each person is a valued member of our team and has a direct impact on the success of the practice. We want you to know we care about you. We recognize everyone is different and likes to receive recognition differently. We welcome your honest feedback in this survey. Here is to more connection, contribution, and fun at work! Let's get to know each other better!

Please circle the response that best describes your feelings about each of the reward and recognition ideas listed below.

	No Importance to Me	Minimal Importance to Me	Neutral	Important to Me	Very Important to Me
Verbal words of thanks given privately	1	2	3	4	5
Verbal recognition given publicly	1	2	3	4	5
Written note of appreciation	1	2	3	4	5
Certificate of appreciation	1	2	3	4	5
Employee of the Month or other company wide monthly or annual recognition	1	2	3	4	5
Recognition for a single event that goes above and beyond	1	2	3	4	5
Gift certificate (restaurant, Amazon, other)	1	2	3	4	5
I appreciate appropriate physical touch, like a hug, fist bump or high five	no way	prefer not	ok with it	I appreciate	bring it on
Team-building events or celebration (cookout, ice cream social, other)	1	2	3	4	5
Recognition in a newsletter, social media, or client communication	prefer not	minimal importance	neutral	I appreciate	yes!
A small gift	1	2	3	4	5
Being able to include my significant other or family member in a company event	1	2	3	4	5
Time off for recognition of my work	1	2	3	4	5
Someone offering to help me with a task	1	2	3	4	5

Members of my family or friends that are important to me:

My hobbies include: _____

My favorite things to do on my day off include:

My favorite places to spend my days off include:

My favorite treat/snack is: _____

My favorite cafe drink order is: _____

My favorite lunch restaurant is: _____

My favorite pizza toppings are: _____

Significant dates in my life:

Birthday _____ Anniversary _____

Name: _____

Date: _____



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AAEP Practice Culture Subcommittee 2023

Mattering At Work

Giving & Receiving Feedback: A Survey for Employees

Feedback plays a crucial role in developing talent, teamwork and morale. When done in a constructive and positive manner, giving and receiving feedback allows us to improve, grow and learn. From that standpoint, we want to understand how you prefer to give and receive feedback.

Please circle the response that best describes your feelings about each of the feedback ideas listed below.

	Disagree Strongly	Disagree	Neutral	Agree	Strongly Agree
I prefer to communicate by email	1	2	3	4	5
I prefer to communicate by text	1	2	3	4	5
I prefer to communicate by phone	1	2	3	4	5
I prefer to communicate in person	1	2	3	4	5
I prefer to communicate by Zoom	1	2	3	4	5
I would like to receive feedback on my performance	Annually	Semi Annually	Quarterly	Monthly	As often as possible
I would like my performance reviews to be in person	1	2	3	4	5
I would like my performance reviews to be virtually, phone, other	1	2	3	4	5
I prefer to have a scheduled meeting regarding feedback or reviews, so I can prepare	1	2	3	4	5
I prefer to have constructive feedback in the morning	1	2	3	4	5
I prefer to have constructive feedback at the end of the workday	1	2	3	4	5
I have a desire to grow and learn in my current role	1	2	3	4	5
I am eager to contribute more than I currently am in my role	1	2	3	4	5
I have a desire to advance from my current role	1	2	3	4	5
It is important to me that management is open to feedback	1	2	3	4	5
I feel management currently is open to feedback, ideas, and my opinions	1	2	3	4	5
It is important to me that my ideas are heard and implemented, when appropriate	1	2	3	4	5

My ideas for better communication at work include: _____

Name: _____

Date: _____



Developed by the AAEP Practice Culture Subcommittee 2023

Work-Life Integration Starts Here

Creating harmony between one's personal life and career is a crucial aspect of any caregiving profession, and the equine veterinary field is no exception. However, the specifics of this integration can vary greatly depending on individual preferences and circumstances. Understanding these differences can help equine practices to appreciate the diverse ways in which individuals in this profession achieve a healthy equilibrium between their personal and professional lives.

For many equine veterinarians, integrating their professional requirements with their core values is an important part of maintaining a healthy work-life balance. This will help to ensure that their professional pursuits are in harmony with their personal goals and aspirations. By doing so, they can find fulfillment not only in their careers but also in other areas that hold significance to them.



Give Autonomy

Employees who have control over their daily schedules are more likely to be satisfied with their jobs and engaged in their work. Giving veterinarians and staff more control over how they structure their day-to-day activities will allow them to allocate time efficiently between professional obligations and personal commitments. This autonomy empowers them to create a schedule that suits their individual needs and preferences. **Dr. Rachel Hosier** feels these benefits profoundly. She says that “having autonomy over my schedule allows me to arrange my days in a way that makes the most sense for my life. I am able to make room for personal commitments, decide when I have the capacity to handle a larger workload, and know where I have room to flex. Having this control helps me keep my life balanced, even when things are busy.”

Set Boundaries

Communication boundaries play a significant role in achieving work-life balance for equine veterinarians. Some may prefer to establish clear boundaries between their personal and professional lives by limiting after-hours communication with clients or colleagues. This allows them to have dedicated time for personal activities without constant interruptions from work-related matters. **Dr. Travis Boston** adds, “By having all communication flow through the office, especially with buy-in from all of our veterinarians, has reduced our mental load substantially. It allows us to truly rest and resent when we are neither working nor on call, making us much more comfortable and efficient doctors when we return to work.”



Allow Unique Schedule Options

Alternative work schedules are another consideration when it comes to achieving a healthy work-life balance. Some equine veterinarians may opt for flexible or part-time schedules that allow them to allocate time for personal commitments or pursue other interests outside of their profession. This flexibility enables them to strike a better equilibrium between their professional responsibilities and personal life. “Working two days per week in equine medicine has allowed me increased flexibility for time with my family and other career endeavors. I still feel I can build strong relationships with clients and coworkers,” shares **Dr. Kristy Moding**.

The blur between personal and professional life creates a challenge for many professionals, but few professions can compare with the pressures faced by equine veterinary teams. At the heart of the challenge is our profession's deep, emotional connection to our patients and to our clients. While achieving integration between veterinary medicine and their personal life looks different for all equine veterinarians, the need to have space away from work is universal.

By understanding and respecting these differences, equine veterinary practices can strive for improved overall well-being.

When team members are fulfilled in all aspects of their lives, they will become more engaged employees, which will undoubtedly benefit the entire organization.



Developed by the
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Communication Boundaries for the Equine Practice

An Introduction

To the Practice Owner:

The following publication helps serve as a general guideline for leading a conversation with your team about boundaries. First, we define boundaries and help you identify scenarios where boundaries may be crossed. Then we provide examples of different boundaries so you can have a candid conversation with your team. We encourage you to utilize this exercise with your team during your next staff meeting.

To the Associate:

The following publication helps serve as a guideline for initiating a discussion with your employer about setting new boundaries in the workplace setting. It may feel awkward to broach this subject, but in the long run, an open discussion will help create a healthy and lasting work relationship. We recommend you share this document with your employer and encourage them to schedule the exercise for your entire team. At a minimum, you should work through the exercise yourself and be ready to discuss pain points/boundaries that need to be better defined.

Let's Define

Boundaries:

“A way to communicate our needs to others via words and actions.”
—Nedra Tawwab

“The limits and rules we set for ourselves within relationships.”
—TherapistAid.com

“Healthy boundaries are the limits you place around your time, emotions, body, and mental health to stay resilient, solid, and content with who you are.”
—TheScienceofPeople.com

Situational Examples:

CLIENT COMMUNICATION

- Calling/Texting/Emailing employees after business hours (especially on weekends off).
- Asking an Associate to sign off on a health certificate for a horse they haven't examined.
- A client called at 4 PM on a Friday with a non-emergent case that has been going on for over a week. They want the horse seen today!

TEAM COMMUNICATION

- The front office asks questions of doctors when they are not at work.
- The more experienced veterinarian gives their opinion to an owner before discussing it with the current doctor managing the case.
- Your colleague asks you to cover a Sunday of emergency duty at the last minute. You already have plans, and this request is becoming a regular occurrence.

An Important Note

The idea of Psychological Safety is imperative to creating a safe, comfortable space for discussion of ideas around boundaries and protocol changes.

Psychological Safety can be defined as the belief that you won't be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes.

At work, it's a shared expectation held by members of a team that teammates will not embarrass, reject, or punish them for sharing ideas, taking risks, or soliciting feedback.

It is important to understand this concept and work toward creating an environment where it is safe to speak up in your practice if you hope to have full participation in the exercise of creating communication boundaries.

Please see the worksheets provided at the end of this handbook.

Identify The Pain Points

Team Exercise

Schedule a time for your team to work through this exercise together (during paid business hours!) You may want to start off with a veterinarian group first and then include the support staff in a follow up meeting.

Ask your employees to consider the following questions:

1. Think of an example where you have felt resentful at work recently.
2. Think of an example where you have felt guilty at work recently.
 - a. Perhaps you couldn't provide service for a client when they wanted you.
 - b. Perhaps a co-worker asked a favor of you that you weren't able to help with.
3. What aspects of work do you find the most draining?



Be willing to share your answers to break the ice! If the staff isn't ready to open up, start by asking them how they would like to handle the previous situational examples or think of some complicated scenarios that you've experienced in your practice and work through those as a team. This may provide a more straightforward discussion or easily applied boundary implementation.

Once you and your employees have identified the pain points,
you can define the problem.

Once the problem is clarified,
you can create a solution to help solve the problem.

Remember!

A boundary is made up of two parts:

1. What you say
2. Your actions to back up what you've said

#2 is KEY in equine practice.

Follow-through from all team members (including leadership) is imperative to re-train our thought processes and those of our clients.

Specific Examples

Let's go back to the examples that were listed on Page 2 and work through solutions to those specific pain points.

Boundary Setting Examples for Client Communication

- Auto-Reply Email
- Standard Voicemail Greeting on Work Phones
- Workplace protocol on ethics of health cert evaluations that everyone in the practice agrees to
- Verbiage that is created by the entire team and endorsed by leadership regarding what constitutes an emergency

Boundary Setting Examples for Team Communication

- Refrain from contacting employees after hours or on their days off. This will require that all doctors complete their medical records and document client communications so the entire team is aware of the plan and can execute it.

Consider using messaging software (Slack, WhatsApp, etc.) that allows employees to silence notifications.

Alternatively, provide employees with a work-specific phone that they leave off when they are not working.

- Pull a colleague aside and say, “When you interjected a different treatment protocol for my patient, it made me feel as though you didn’t value my opinion. I felt as though the client had less faith in my skills. I would appreciate it if you would talk to me privately before doing that.”



If this is not something you feel comfortable or safe to say in your practice, management needs to establish a forum for sharing concerns or ideas for change.

Consider using the 15five program, an anonymous comment box or google survey form or specific office hours for management to be available for discussion.

- Say no. You have trained this colleague that you are willing to drop your plans regularly. Explain that you are happy to help cover in extreme circumstances but that on-call switches need to be made with a certain amount of notice.

Ask management to set up a meeting to establish timelines for advance notice of changing on-call days.

Create a mantra to support yourself and your personal time. For example: “My time is valuable, and I will protect my personal activities knowing that I give my all while I am at work.”

ADDITIONAL RESOURCES



Practice Agreement Form

Our Practice Norms:

Our Practice's Protocols – Boundaries to Protect Employee Well-being:

By signing this page, I agree to uphold the team's protocols and follow through on the boundaries we have set. My active respect for these guidelines and encouragement of my teammates to follow them will cultivate a culture of mutual respect and well-being amongst the team and our clients.

Name: _____

Date: _____



Personal Boundaries Form

Our Practice Norms and Important Boundaries:

I agree to do the follow things in order to uphold our practice's norms and boundaries and to support myself in this work.

By signing this page, I agree to uphold the team's protocols and follow through on the boundaries we have set. My active respect for these guidelines and encouragement of my teammates to follow them will cultivate a culture of mutual respect and well-being amongst the team and our clients.

Name: _____

Date: _____



Opportunities for Growth

The Stay Interview: Guidance for Leaders

Conducting a stay interview provides an opportunity to gather information and make changes *BEFORE* a valuable member of your team leaves (and hopefully prevents them from leaving). Stay interviews are a preventative measure!¹

Essential Skills for a Successful Interview²

- Listen 80% of the time.
- Ask probing follow-up questions.
- Ask the same/similar questions repeatedly over time to monitor trends in responses and perceptions.
- Take notes.
- Avoid defensiveness.

5 Questions to Ask²

1) What do you look forward to each day when you get ready for work?

Follow-ups: “Give me an example” “Tell me more about...”
“Who do you look forward to working with the most?”

2) What are you learning here and what do you want to learn?

Follow-ups: “Which other jobs here look attractive to you?”
“What skills would you have to build to attain those jobs or some responsibilities of those jobs?”

3) Why do you stay here?

Follow-ups: “Tell me more about why that is so important to you.” “Is that the only reason you stay or are there others?” “If you narrowed your reasons to stay to just one, what would it be?”

4) When is the last time you thought about leaving us, and what prompted it?

Follow-ups: “Tell me more about what happened. Who said what?” “What’s the single best thing I can do to make that better for you?” “How important is that to you now on a 1-10 scale?”

5) What can I do to make your job better for you?

Follow-ups: “Do I tell you when you do something well?” “Do I say and do things to help you do your job better?” “What are three ways I can be a better manager for you?”

Closing the Interview³

- Summarize the key reasons the employee gave for staying or potentially leaving the organization and work with the employee to develop a stay plan.
- End on a positive note!

For More Information

The Power of Stay Interviews for Engagement and Retention (book) by Richard P. Finnegan

References:

1. “15 Best Questions to Ask in Your Next Stay Interview” (article) by Elise Paulsen (<https://www.quantumworkplace.com/future-of-work/stay-interviews>)
2. “How to Conduct Stay Interviews: 5 Key Questions” (article) by Richard P. Finnegan (<https://www.shrm.org/resourcesandtools/hr-topics/employee-relations/pages/how-to-conduct-stay-interviews-part-2.aspx>)
3. Stay Interview Questions” (article - <https://www.shrm.org/resourcesandtools/tools-and-samples/hr-forms/pages/stayinterviewquestions.aspx>)



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Opportunities for Growth

The Stay Interview: Discussion Questions

The Stay Interview invites you to provide regular feedback to our leadership team about your satisfaction with your employment experience. The following questions will serve as a guide for our upcoming discussion but please know we welcome your ideas and observations on an ongoing basis. Your contributions are valued!

5 Questions for Your Consideration¹

1) What do you look forward to each day when you get ready for work?

2) What are you learning here and what do you want to learn?

3) Why do you stay here?

4) When is the last time you thought about leaving us, and what prompted it?

5) What can I do to make your job better for you?

Reference: 1. "How to Conduct Stay Interviews: 5 Key Questions" (article) by Richard P. Finnegan
(<https://www.shrm.org/resourcesandtools/hr-topics/employee-relations/pages/how-to-conduct-stay-interviews-part-2.aspx>)

**This Toolkit was developed by the
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