

# Draft Facilitation Guide

## Small Group Discussion: Retirement & Succession Planning

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This draft guide was designed to accompany the 2 hour small group retirement and succession planning session facilitated by the regional Practice Support Program in partnership with the Nanaimo and Oceanside Divisions of Family Practice and Dr. Bruce Hobson, in December 2015.

### Blue Sky and Black Sky Scenario

1. Frame the discussion:
    - The purpose of the Blue Sky and Black Sky Scenario exercise is to identify physicians' needs for future retirement and succession planning sessions
  2. Break into four groups (potentially could change to six groups, depending on attendance)
  3. Facilitate and record blue sky/black sky discussion, based on the questions below, and create themes.
  4. After themes are created, facilitate a dotmocracy exercise to identify top three priorities.
    - If more than one Division or group is in the same session, provide different coloured dots for each group
  5. Following the prioritization session on the themes, ask physicians to indicate their timeframe for retiring (Within 6 months, Within 1 year, 1-2 years, 2+ years, 5+ years).
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### Blue Sky/Black Sky Questions to post and pose to participants in their respective groups

#### Blue Sky

- What would be your ideal situation for retirement? /What would be your dream?
- What would you be your ideal process? (eg. start working PT in X months... )
- If you had the support, how would you prepare to close down your practice
  - What would that support look like?
    - EMR, cleaning up your patient panel, staff support
- Ideally how much time would you like to spend in transition period to retiring (or refocussing)
- If you are looking to join a practice, what would entice you? What is appealing? What would ideal practice look like?
- Who would you like to involve in the process to retire?

#### Black Sky

- What is biggest hurdle to overcome?
- What worries you? (e.g. process, financial, family, will the personality of the new doctor fit with your colleagues and patients, leaving patient orphaned)
- What are obstacles preventing you from retiring?
  - If support was available what would that look like (to help with those obstacles)?