

Module 2 (M2): Preparing a Wellness Plan

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Module 2 (M2) Overview

Module 2 (M2): Preparing a Wellness Plan

Module 2: Overview

HEALTH MENTOR PROGRAM GOALS:

- Students will value the contributions of each member of the interprofessional healthcare team
- Students will understand the perspective of the patient and value patient-centered care
- Students will appreciate how a person's health conditions and impairments interact with personal and environmental factors

Visit and Assignment must be completed by [insert time here] on [insert date here].

Goal: To further develop and strengthen the skills necessary to function as a successful team through completion of a patient-centered wellness plan with the Health Mentor.

Objectives:

Upon completion of this module, students will:

1. Identify two specific dimensions of wellness in developing an evidence-based wellness plan for the Health Mentor.
2. Explain the role of the Health Mentor's cultural values and habits as they relate to their personal health and wellness.
3. Evaluate the Health Mentor's wellness and his/her ability to maintain or make positive changes toward a balanced life.
4. Discuss potential facilitators, barriers, opportunities and threats in pursuing an individualized wellness plan for the Health Mentor.
5. Identify the role of each interprofessional team member in empowering a person with a health condition/impairment in developing his/her personal wellness plan.

Measurement:

1. Completion of Evidence-Based Team Wellness Plan (team assignment)
2. Completion of the Team Performance Survey (individual assignment)
3. Discussion of wellness, challenges to interviewing and interprofessional collaboration/group process during the interprofessional small group session

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M2 Visit Guide

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Module 2: Visit Guide

PART I: Module Preparation

Scheduling: Health Mentor Meeting

Each team will be scheduled to meet with their mentor on **ONE** of the following dates according to their mentor's schedule.

[Insert dates here] [Insert times here]

Health Mentor Meeting Information will be posted by [insert date here] on Pulse

[insert location here]

An email will also be sent to your team the Thursday before your Monday's meeting. If you have any questions regarding this meeting, please contact [insert contact information here].

Pre-Reading:

Prior to your scheduled Health Mentor meeting, please review, the following documents:

1. Wellness Questionnaire (**see Attachment I, pages 10-13**). This Wellness Questionnaire is meant to be used as a guideline or *starting point* for your wellness interview with your Health Mentor and WILL NOT be handed in or graded.
2. Wellness Plan (page 15)
3. Sample Wellness Plan (page 17)

Materials:

1. Bring a copy of the Wellness Questionnaire to your team meeting
2. One laptop per team will be helpful for completion of team assignment after meeting
3. Feel free to bring lunch to your student team meeting
- 4.

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PART II: Health Mentor Visit

Overview:

[insert time here]	Student Team Meeting
[insert time here]	Meeting with your Health Mentor
[insert time here]	Team Debriefing/Team Assignment Completion

12:00 - 12:30pm: Student Team Meeting

1. Review and Discuss Wellness Questionnaire
 - a. As a team, review and discuss the Wellness Questionnaire (**See Attachment I, pages 10-13**). Use the first 30 minutes of your team meeting to **adapt and customize** this set of questions, based on your knowledge of the health and wellness issues pertinent to your Health Mentor from Module 1. Your team may choose to add or delete questions in each area or may want to add new dimensions of wellness, which are not included on this form. Your team may also choose to focus your interview on several dimensions of wellness, rather than addressing all of the dimensions listed, or you may follow the flow of conversation with your Health Mentor.
 - b. This Wellness Questionnaire is meant to be used as a guideline or *starting point* for your wellness interview with your Health Mentor and WILL NOT be handed in or graded.
2. As you develop a tentative agenda for your team interview, consider the following:
 - a. *Are there certain areas of wellness that are missing from the Wellness Questionnaire or areas that you would also like to explore in more detail with your Health Mentor?*
 - b. *Are there areas that you have already covered in Module 1 or that seem less important to your Health Mentor and should be eliminated for your interview?*
 - c. *Review your Health Mentor's wellness in relation to the activity limitations and participation restrictions that you discovered in Module 1. Consider **personal factors** (individual background, education, temperament, etc) and **environmental factors** in your Health Mentor's environment (home layout, family/neighbor support, etc).*
 - d. *What factors help your Health Mentor to have a healthy lifestyle (Strengths, Opportunities)?*
 - e. *What factors make creating a healthy lifestyle difficult for your Health Mentor (Weaknesses, Threats or Barriers)?*
 - f. *If there is a dimension of wellness that appears deficient, try to elicit what your Health Mentor feels about that area.*
 - g. *Has your Health Mentor already identified goals or would he/she like to identify goals to improve his/her wellness in this area?*
3. Prepare a Team Interview Strategy
 - a. As a team, discuss your team interview strategy for this visit. Here are some questions to consider:
 - i. *How will you open/close the interview? Who will do this?*
 - ii. *Who will ask which questions and in what order?*
 - iii. *How will you utilize active listening skills?*

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- iv. *What will you do if the interview starts to go “off track” or runs “too long”? How can you use reflective listening, bridging techniques, validation and transitions to keep the flow of the interview smooth and focused on topic?*

[insert time here] Meeting with your Health Mentor

1. As a team, discuss with your Health Mentor his/her personal wellness using the Wellness Questionnaire as a *starting point* for your interview. **(See Attachment I, pages 10-13)**
 - a. As noted above, feel free to ask other questions that you have identified as missing from the wellness questionnaire, to delete questions, or to change the wording of questions in the questionnaire to better fit your team interview style and to individualize for your Health Mentor.

[insert time here] Team Debriefing/Team Assignment

1. Team Debriefing - After your interview with your Health Mentor, please debrief with your team to discuss your experience with conducting the Wellness Questionnaire and interview with your Health Mentor. Please address what went well and what did not work well in planning and conducting this visit. As a team, consider the following:
 - a. *What aspects of wellness are important to your Health Mentor?*
 - b. *What are your Health Mentor’s strengths and/or challenges (i.e. opportunities /threats) for adhering to and sustaining his/her wellness plan?*
 - c. *How can each member of the healthcare team support your Health Mentor in successfully implementing each of the strategies identified in his/her wellness plan? (Examples of Healthcare Team Members: PCP, Specialist, Nurse, NP, PT, OT, Pharmacist, Couple and Family Therapist, Speech Therapist, Psychologist, Social Work, Vocational Rehab Specialist, etc.)*
2. Team Assignment
 - a. If time permits, your team may want to begin to identify the dimensions of wellness and wellness goals that you will focus on for Team Assignment (see page 9). You may want to discuss a strategy for searching the literature for articles related to these goals as well as for completing the Wellness Plan on your team wiki.

M2 Team and Individual Assignments

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Team Assignments – All assignments are due by noon on April 15, 2013.

1. M1 Team Assignment - Evidence-Based Wellness Plan

- A. Using the notes from your Wellness interview with your Health Mentor and after consulting the literature, select 2 dimensions of wellness (i.e. Physical, Nutritional, Self-Care, Safety, Social, Emotional/Relational Health, Sexuality, Intellectual, Occupational, or Spiritual) to create a comprehensive Evidence-Based Wellness Plan on your Team Wiki for each of these 2 dimensions (see Attachment II, page 17). [insert location here]
 - i. For the column labeled “Evidence-Based Reference,” please cite one reference for each dimension and provide a one-sentence summary of the evidence reviewed in this article.
 - ii. For an example, see Attachment III: How to Complete an Evidence-Based Wellness Plan, page 19.
 - iii. Grading: Course faculty will review your team Evidence-based Wellness Plan and provide you with feedback/comments.
 - a. [insert location here]

2. M2 Individual Assignment- Team Performance Scale (TPS)

- A. After completing your team assignment, please go to the Health Mentor’s course site (located under the courses tab of Pulse), click on the main menu section entitled “Team Survey” and complete the Team Performance Scale (TPS). Please answer the questions based on your overall experience with your team during this module’s activities and assignments.
- B. [Insert **TPS location here**]
 - i. All students must individually complete the TPS in order to receive the aggregate team score. To view this score, click back on the same link you used to access and complete the Team Survey.
 - ii. All students must individually complete the TPS in order to receive the aggregate team score. To view this score, click back on the same link you used to access and complete the Team Survey.

3. IPE Small Group Sessions – [insert date here]

- A. Preparation: After you have completed both team and individual assignments, please prepare for your small group sessions on **[insert date here]**.
 - i. See Student Instructions for details for preparing for this session on [insert location here]

**M2 Wellness Plan Questionnaire
(Attachment I)**

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M2 Attachment I: Wellness Questionnaire

Please discuss with your Health Mentor his/her personal wellness, using this Wellness Questionnaire as a **starting point only**. Your team may choose to add or delete questions in each area. Your team may also choose to focus your interview on several dimensions of wellness, rather than addressing all of the dimensions listed, or you may follow the flow of conversation with your Health Mentor. This Wellness Questionnaire is meant to be used as a *general guideline* for your wellness interview with your Health Mentor and WILL NOT be submitted or graded. This interview should, however, help you to prepare for completing your team assignment, the Evidence-Based Wellness Plan. (The questions below were adapted from a questionnaire from www.testwell.org.)

1. Physical Health

a. Sample Questions:

- i. What does your physical activity include (stretching, walking, house cleaning, etc.)?
- ii. How long do you spend doing this activity?
- iii. How many times a week?

2. Nutritional Health

a. Sample Questions:

- i. Describe what you ate for each of your meals yesterday.
- ii. Describe how you make decisions about what you eat.
- iii. Describe things that you look for on a food label.

3. Self-Care/Management

a. Sample Questions:

- i. What activities do you do regularly to promote/manage your health? How often do you participate in these activities (daily, weekly, monthly, etc)?
- ii. How do you manage your blood pressure? Is it high, normal or low?
- iii. How do you care for your teeth on a daily basis (brush, floss, avoid certain foods, etc)?
- iv. What do you do to protect your skin (sunscreen, long sleeves, hats, etc)?

4. Safety

a. Sample Questions:

- i. Describe any measures that you take on a regular basis to be safe.
- ii. Describe the safety of your home and/or work environment.
- iii. How do you feel about your vision/hearing/balance?

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5. Emotional/Relational Health

a. Sample Questions:

- i. Are you satisfied with your life right now?
 1. If so, what has made it satisfying?
 2. If not, what might you like to change?
- ii. Describe ways in which you stay connected to the important people in your life.
- iii. Who are the people who matter most to you?

6. Environment

a. Sample Questions:

- i. What in your home environment makes it easier or harder for you to accomplish the things you need to do?
- ii. What in your work environment makes it easier or harder for you to accomplish the things you need to do?
- iii. What in your community environment makes it easier or harder for you to accomplish the things you need to do?

7. Sexuality

a. Sample Questions:

- i. How would you describe your mood (happy, sad, tired, lonely, busy, etc)?
 1. Is this a change from the past for you? If so, why do you think this has changed?
- ii. Are you satisfied with your life right now?
 1. If so, what has made it satisfying? If not, what might you like to change?
- iii. Are you satisfied with your current level of sexual activity or intimacy?
 1. If so, what has made it satisfying? If not, what might you like to change?

8. Intellectual Wellness

a. Sample Questions:

- i. How far did you go in school (high school, some college, etc)?
- ii. What kinds of things (activities, crosswords, cards, etc) do you do to keep your mind active?

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9. Employment Wellness

- a. Sample Questions:
 - i. Are you working outside of the home? What do you do?
 - ii. How are you managing your household? Are you satisfied with this?
 - iii. What do you do during your free time to occupy yourself? Hobbies? Interests?
 - iv. How do you feel about the balance between your 'work' and 'leisure' time?

10. Spirituality and Values

- a. Sample Questions:
 - i. How does religion or spirituality play a role in your life?
 - ii. What do you value most in your life?

11. General/Other – *Students, please add in any additional questions to this list and feel free to incorporate these more general questions throughout your interview or to use them to start off your interview...*

- a) What strategies do you use to stay well?
- b) What behaviors get in the way of your well-being?
- c) What aspect(s) of wellness is easiest for you to achieve? Why do you think this is?
- d) What aspect(s) of wellness is hardest for you to achieve? Why do you think this is?
- e) What people (health care team members, friends/family, other) could be of most help to you staying well and why?
- f) What personal (outlook, values, resources, etc.) or environmental factors (home, neighborhood, community, etc.) could be of most help to you in staying well and why?
- g) What one or two areas of wellness are you most interested in changing or maintaining?

**M2 Evidence – Based Wellness Plan
(Attachment II)**

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M2 Team Assignment

Attachment II: Evidence-Based Wellness Plan

Instructions: Using the notes from your Wellness interview with your Health Mentor and after consulting the evidence, please select 2 dimensions of wellness (i.e. Physical, Nutritional, Self-Care, Safety, Emotional/Relational, Sexuality, Intellectual, Occupational, and Spiritual) and complete the following grid, to create a comprehensive, evidence-based Wellness Plan for your Health Mentor. For the column labeled “Evidence-Based Reference,” please cite one reference article to your case for each dimension and provide a one-sentence summary/take home impact of the evidence reviewed in this article. Some examples of potential team members may include Mentor, PCP, Specialist, Nurse, PT, OT, Pharmacist, Couple and Family Therapist, Speech Therapist, Psychologist, Social Work, Nutritionist, Vocational Rehab Specialist, etc. A completed sample is provided for your reference (see page 19).

Dimensions of Wellness/ Patient-centered functional goal	Strategies/Behaviors to address needs	Potential barriers or facilitators for achieving goal	Identify how different members of the healthcare team might support his/her wellness goal	Evidenced-Based References
<p><i>Dimension #1:</i></p> <p><i>Goal:</i></p>				
<p><i>Dimension #2:</i></p> <p><i>Goal:</i></p>				

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**M2 Sample Wellness Plan
(Attachment III)**

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M2 Attachment III: Sample Wellness Plan

Here is an example of how you might complete this Wellness Plan for one dimension. For your assignment, be sure to complete this form for 2 dimensions of wellness as listed in your assignment instructions.

Dimensions of Wellness/ Patient-centered functional goal	Strategies/Behaviors to address needs	Potential barriers or facilitators for achieving goal	Identify how different members of the healthcare team might support his/her wellness goal	Evidenced-Based References
<p>Dimension:</p> <p><i>Physical Health</i></p> <p>Goal:</p> <p><i>To safely increase level of physical activity and develop a more active lifestyle to prevent future falls in a person with a history of falling</i></p>	<p>Strategy:</p> <ul style="list-style-type: none"> • <i>Attend twice weekly outpatient PT sessions to improve balance, gait pattern, endurance; schedule outpatient home safety evaluation with OT.</i> • <i>Once the outpatient PT program is completed, join local YMCA and attend Silver Sneakers programs three times a week to increase aerobic activity and muscle strengthening;</i> • <i>Incorporate lifestyle changes to adopt a more active lifestyle Mentor will contact YMCA and request membership information</i> 	<p>Barrier:</p> <ul style="list-style-type: none"> • <i>Financial situation: fixed income, difficulty affording co-pays for therapy services and gym membership</i> <p>Facilitator:</p> <ul style="list-style-type: none"> • <i>Daughter lives nearby and can transport patient to PT sessions and YMCA classes</i> • <i>Mentor lives in a one story house with no steps to enter</i> 	<p>Social Worker: <i>Mentor will contact Social Worker to identify programs to assist with cost of gym membership (ex. Insurance benefits, etc)</i></p> <p>PCP: <i>Mentor and PCP will discuss safety of starting a new exercise regimen and strategies for avoiding injury given Mentor's history of Coronary Artery Disease</i></p> <p>Physical Therapist: <i>Mentor will continue visits with PT to work on balance and gait training to avoid future falls</i></p> <p>Occupational Therapist: <i>Mentor will work with OT to assess safety and mobility in the home</i></p>	<p>Description: <i>'Community-based education and balance training programs, such as Stand Up!, can promote long-term maintenance of physical activity in older adults.'</i></p> <p>Reference: <i>LaForest S, Pelletier A, Gauvin L, et al. Impact of a Community-Based Falls Prevention Program on Maintenance of Physical Activity Among Older Adults. Journal of Aging and Health. 2009;21(3):480-500.</i></p>

**M2 How to Present an Evidence–Based
Article
(Attachment IV)**

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M2 Attachment IV: How to Present an Evidence-Based Article

Example, Small Group Session Presentation of Evidence-Based Reference

Sample Presentation:

“This study examines the 9 month impact of a 12-week falls prevention program called Stand Up! The Stand Up! Program includes an exercise component of an educational module (30 minutes, once a week) along with group (1-hour, 2x a week) and home (30 minutes, once a week) exercises. Older adults who participated in this study had access to a variety of community group exercise programs plus materials to assist with home exercises. At the 9 month follow up, older adults in the experimental group had an increased level of physical activity and energy expenditure than those in the control group. The study reveals that promoting physical activity had a positive impact on the overall health of older adults, including balance and mobility. This program is still under investigation with promising results.”