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Office of Patient Centered Care and
Cultural Transformation

Whole
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Welcome to Whole Health Partner Training



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Module 1 – Personal Introductions



PERSONAL INTRODUCTIONS

1. How do you want to be addressed in this training?
2. Where are you from and what's your role?
3. Answer one of the following:
 - What is one thing you want the group to know about you?
 - What is something you do that reflects an important value of yours?
 - What is one thing fun about you, or one thing you do for fun?

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Module 2 – Community Agreements



COMMUNITY AGREEMENTS

- Be Timely: Arriving in the morning, returning from breaks and returning from lunch
- Turn off cell phone ringers/set to vibrate
- Be Present: Avoid Multi-tasking
- Observe yourself and self-manage: Avoid verbal and non-verbal behaviors that detract from other's learning



COMMUNITY AGREEMENTS

- Participate in all small group and practice activities
- Support each other in the training experience
- Practice Confidentiality –
 - Please don't share other's personal stories
 - Please refrain from videoing others
- Practice Respect – Avoid giving advice
- “Try on” the principles, process, and skills of Whole Health Group Facilitation



COMMUNITY AGREEMENTS

- You choose how you want to be in this training. Some possibilities are:
 - Relax
 - Be Curious
 - Experiment
 - Have fun
 - Make some mistakes
- Other Group Guidelines/Practices?

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Module 3 - What is a Whole Health Partner?



WHAT DO WHOLE HEALTH PARTNERS DO?

- **Promote** the utilization of WH Pathways for fellow Veterans
- **Accompany** Veterans on their Whole Health Journey
- **Recruit** Veterans to engage in the WH Pathway/Well-being offerings
- **Train/facilitate** the *Taking Charge of My Life and Health Course*
- **Navigate** Veterans through the WH Journey and Well-being Options
- **Encourage** fellow Veterans as they engage in their WH Journey
- **Role Model** by participating in their own WH Journey
- **Support** fellow-Veterans as they engage in their WH Journey



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Module 4 - What is Whole Health System, Pathway and Journey Map?



WHAT IS WHOLE HEALTH?

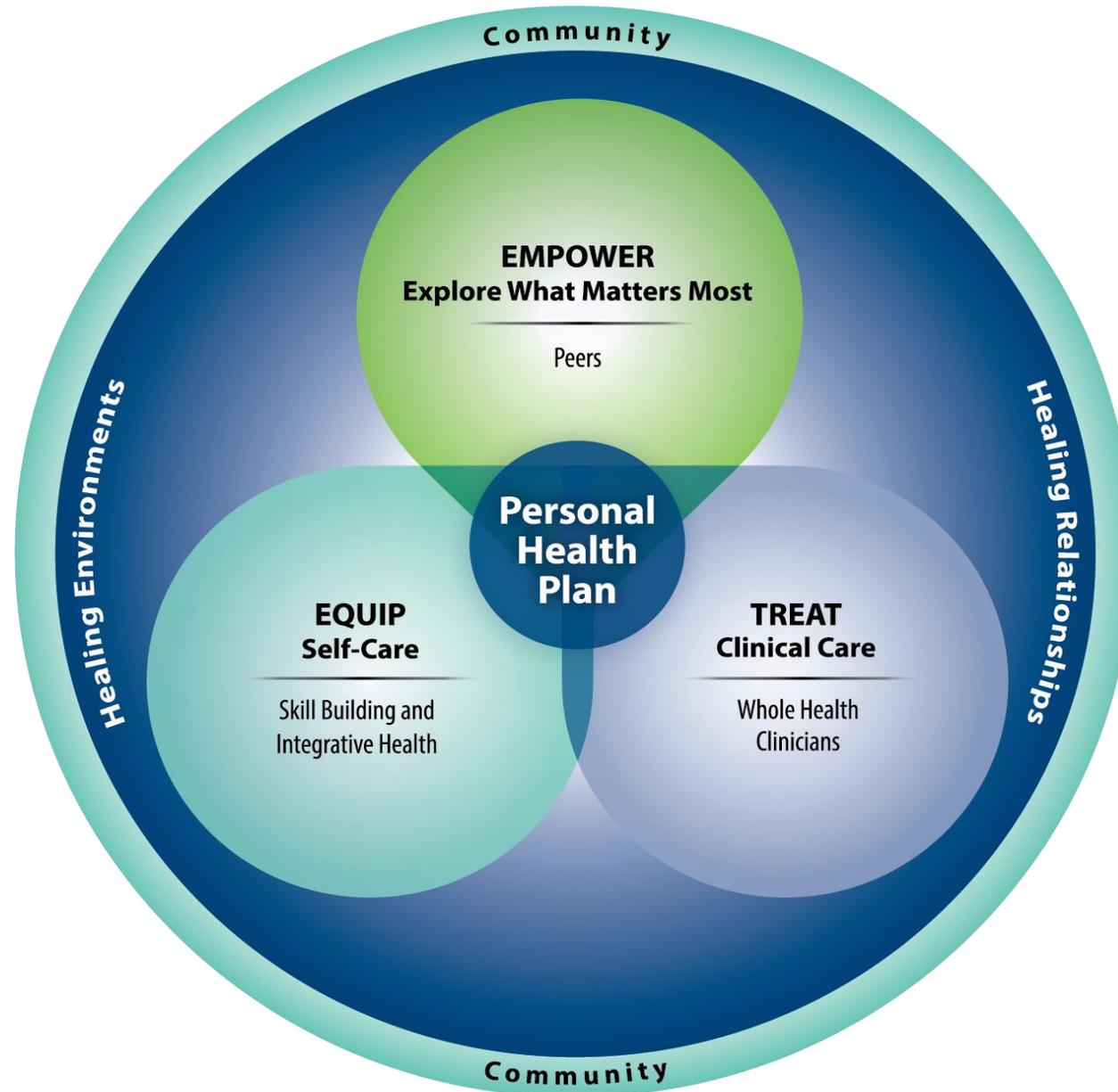
Whole Health

is an approach to health care that

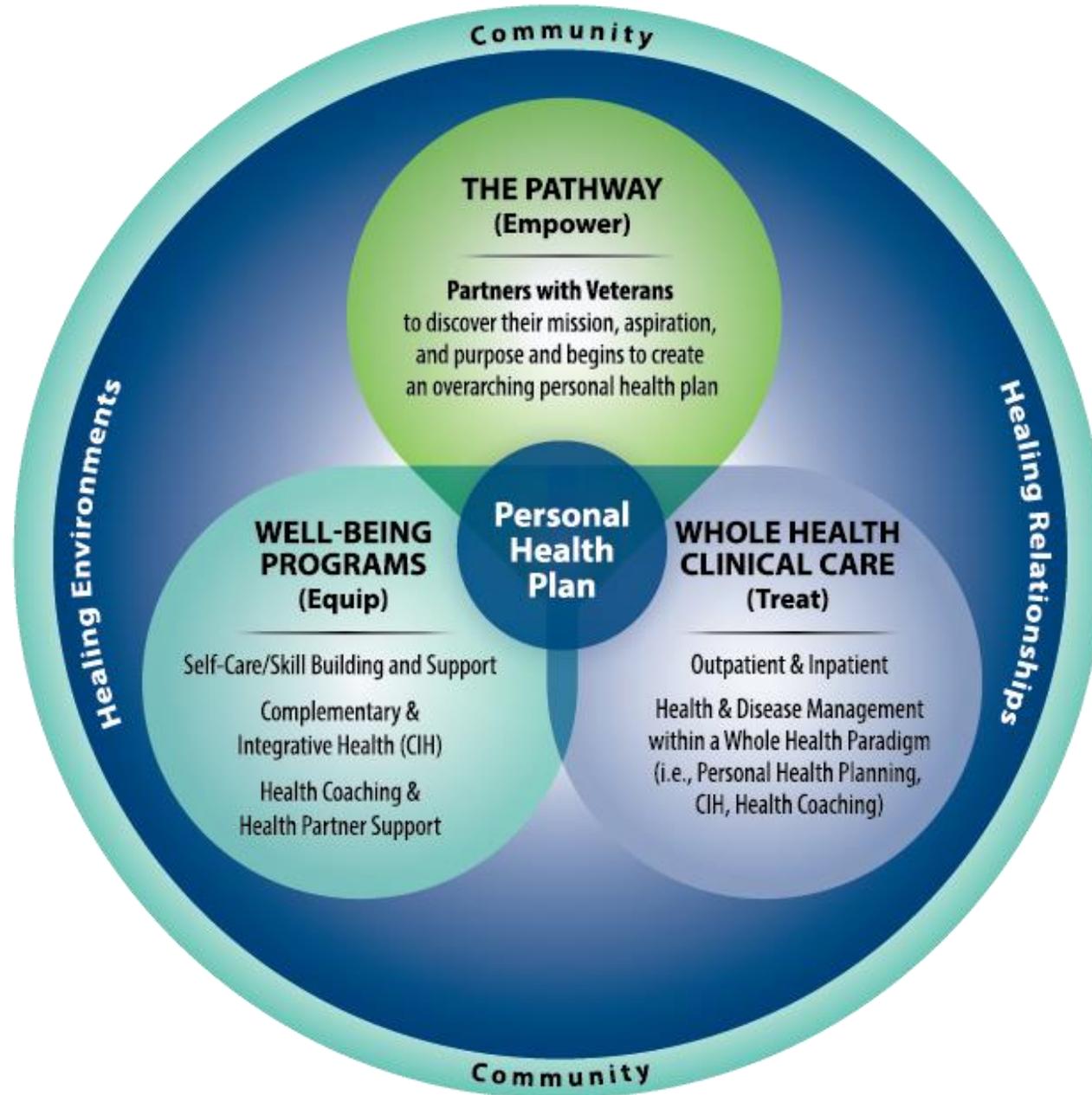
empowers and ***equips***

people to take charge of their health and well-being,
and live their life to the fullest.

The Whole Health System



The Whole Health System





Why Empower?

em·pow·er

verb

- give (someone) the authority or power to do something
- make (someone) stronger and more confident, especially in controlling their life and claiming their rights



The Whole Health Pathway

- The **Pathway** component of the Whole Health System (WHS) **empowers Veterans to explore what really matters to them** through mindful self-exploration of their mission, aspiration or purpose (MAP) and to **set personal goals** that allow them to be actively engaged in optimizing their health and well-being.
- The Pathway is not necessarily a specific physical location, but rather a set of various Whole Health group programs and supportive services provided by trained and qualified individuals that are designed to help the **Veterans begin and maintain their journey to well-being.**



Veteran Peers in the Pathway

- **Fellow Veterans, or peers**, who have received training in Whole Health are key elements of the Pathway.
- These peer facilitators may be non-clinical Veteran staff, WH Partners, Peer Support Specialists or registered Veteran volunteers.
- Offering Pathway programming from peers enables Veterans to learn strategies to enhance well-being **outside of the traditional clinical setting** which may decrease demand on providers.



WH Pathway Groups

- **The Introduction to Whole Health and Taking Charge of My Life and Health (TCMLH)** are the two main WH groups offered in the Pathway.
- **The Introduction to Whole Health** is a **2-hour educational and experiential session** based on a specific curriculum that exposes participants to the foundational concepts of WH, allows time for self-care and self-exploration, and for completion of a Personal Health Inventory (PHI). These groups are related to the Executive Order, and the focus is on transitioning Service members, but all Veterans are welcome.
- Facilitators receive a **2-hour virtual training** to learn how to deliver the Introduction to WH session.



WH Pathway Groups

- **TCMLH** is a longer-term group program based on a specific curriculum where Veterans can **delve deeper into self-exploration** of areas in their lives they wish to enhance and to create a personalized health plan with **SMART goals and action steps** that will help them attain these goals.
- TCMLH facilitators receive a **3-day in person training** to learn how to deliver the TCMLH group program.

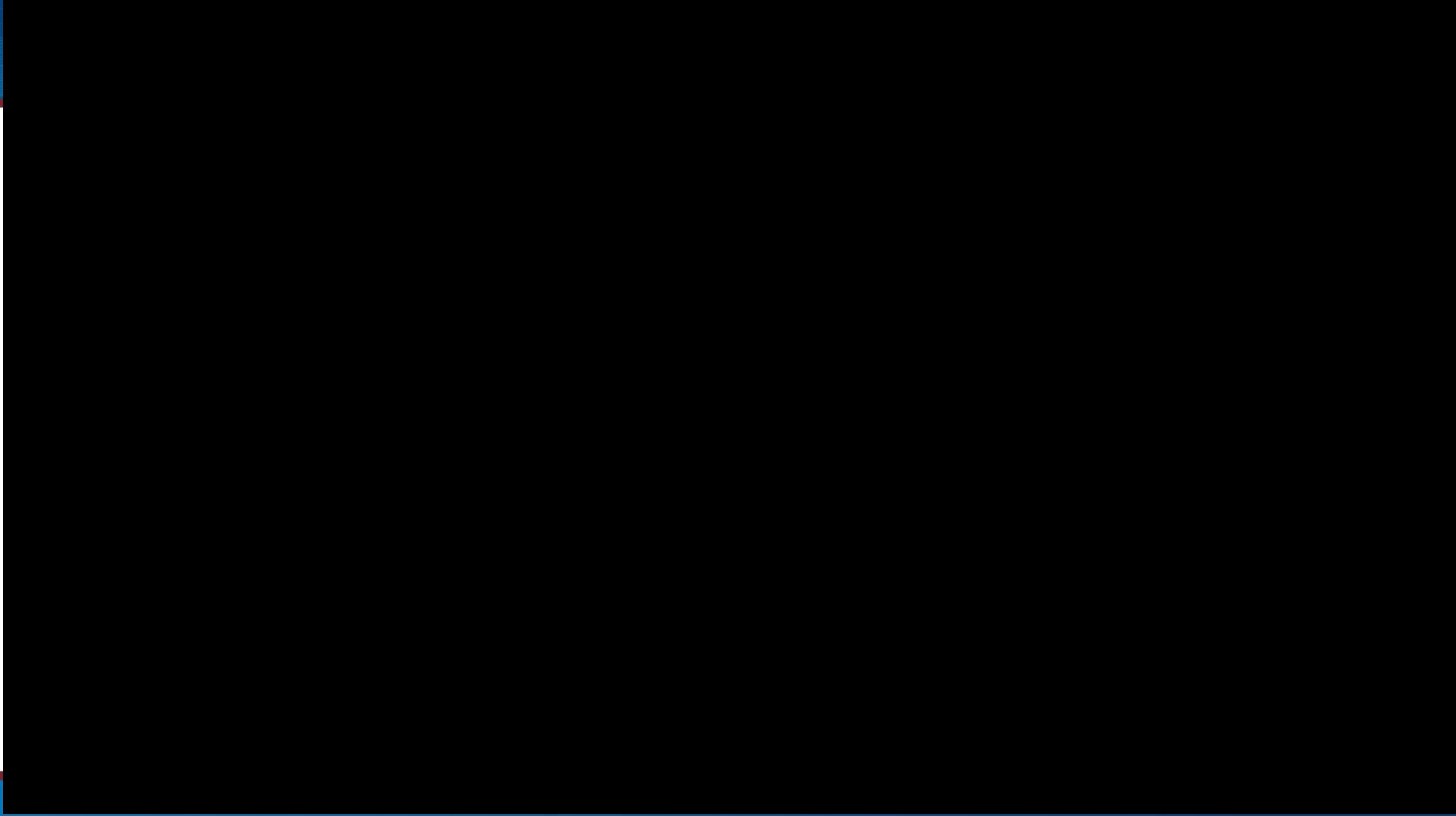
- Who? Non-clinical Veteran staff, Whole Health Partners, Peer Support Specialist, Veteran Volunteers.
- Primary Tasks: Facilitate Intro to Whole Health locally, Introduce Veterans to Whole Health, offer a Whole Health Experience and offer warm hand-off to TCMLH groups.



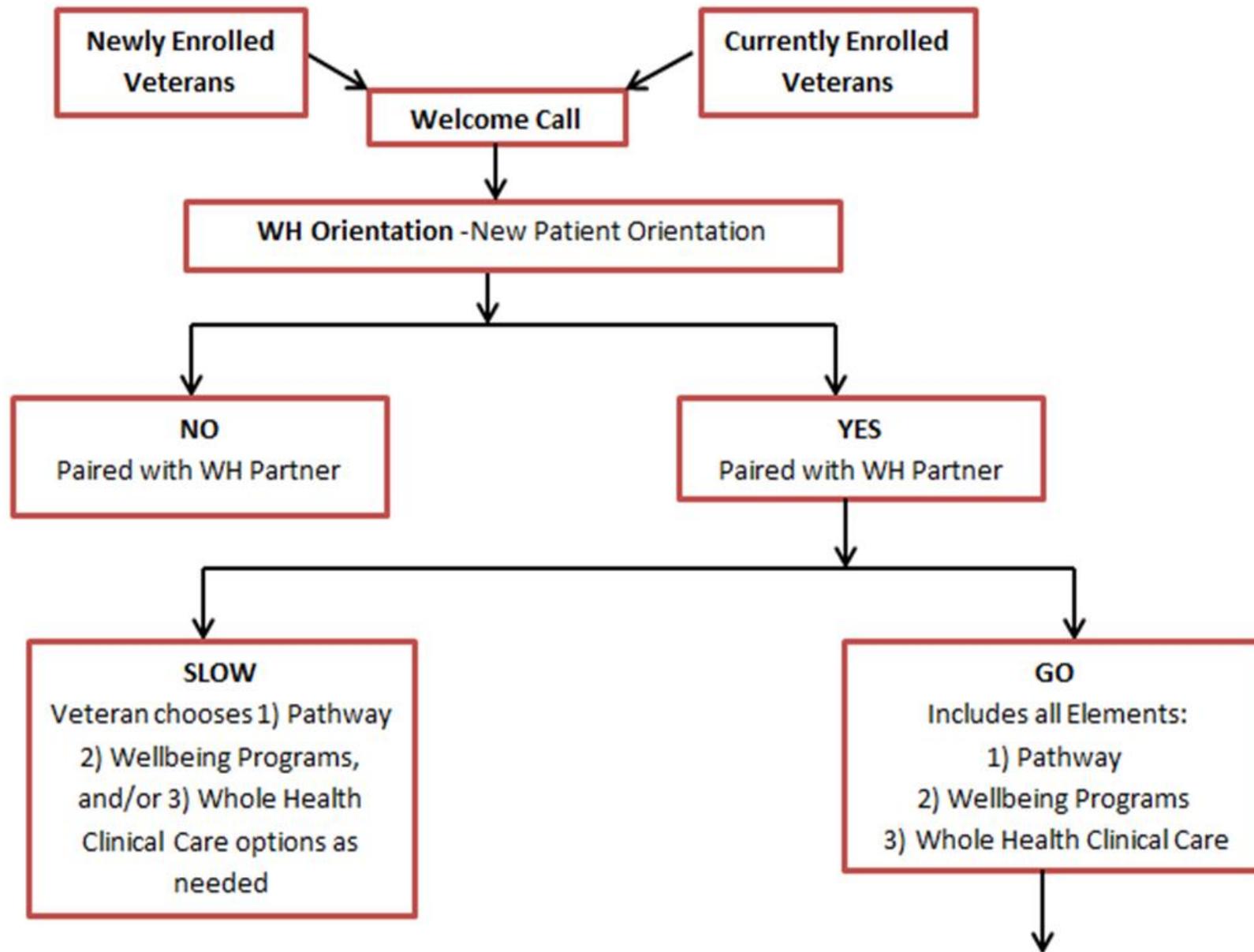
- Who? Non-clinical Veteran staff, Whole Health Partners. Peer Support Specialists, Veteran Volunteers
- Primary Tasks: Facilitate TCMLH Groups, Introduce Whole Health concepts and provide a Whole Health Experience.

- Who? Employees meeting the Whole Health Coaching Position Description.
- Primary Tasks: Support Veterans in making sustainable, health lifestyle behavior changes, offer individual or group coaching in person, telephonically or via telehealth. Trained Veteran Whole Health Coaches can offer Introduction to Whole Health and/or TCMLH Groups.

- Who? Veteran Employee who meets qualification in Whole Health Partner Position Description.
- Primary Tasks: Recruit Veterans to Whole Health, Offer Whole Health resources, provided ongoing support, conduct outreach to community services, engage with Veterans one-on-one and trained Partners can offer Introduction to Whole Health and/or TCMLH Groups.



Veterans' Whole Health Journey



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Module 5 – Mindful Awareness Review and Practice



MINDFUL AWARENESS

“Paying attention on purpose in the present moment, and non-judgmentally.”

Jon Kabat-Zinn PhD

Mind Full, or Mindful?



Photo credit: ForbesOste via Foter.com

@forbesoste



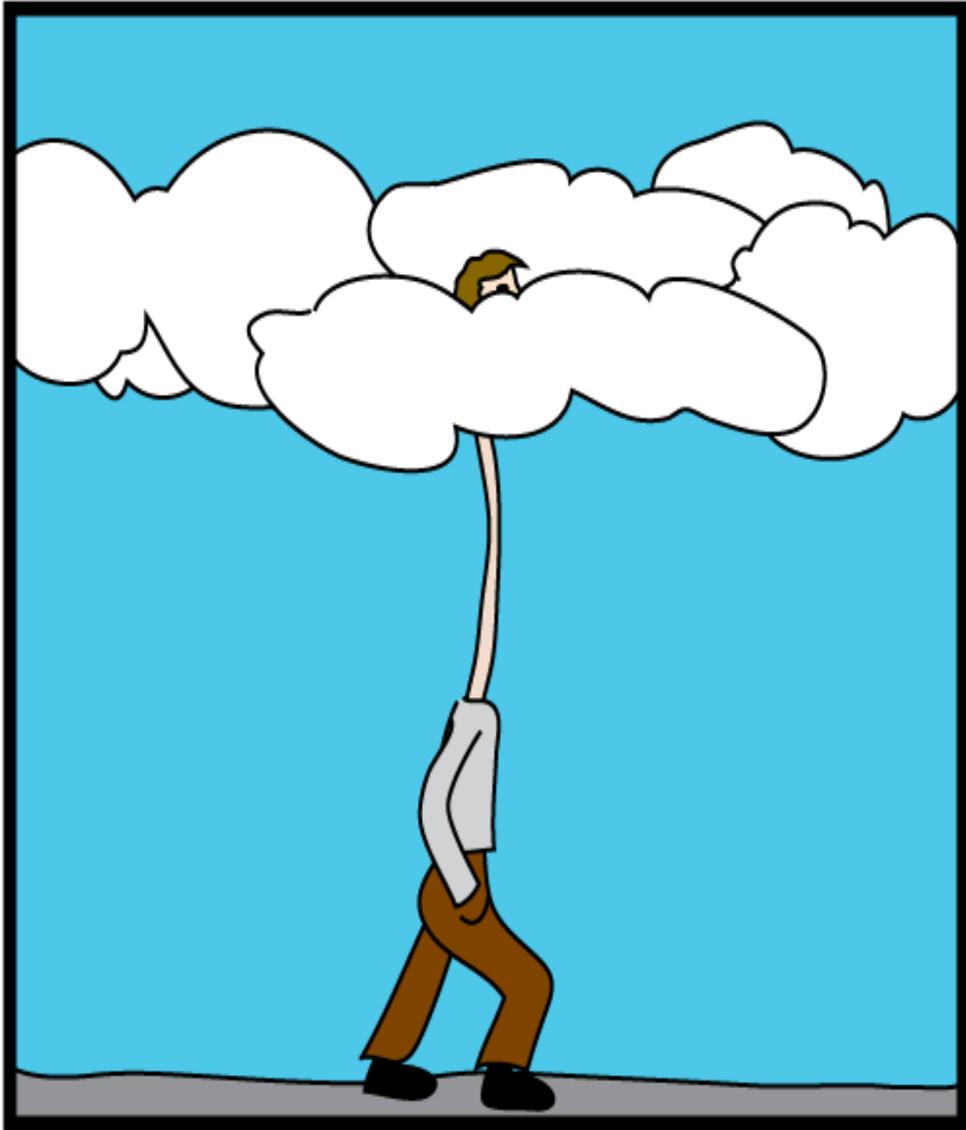
MINDFUL AWARENESS

“The intention to pay attention, in the present moment, with a friendly and open orientation.”

Jeff Brantley M.D.



MINDFUL AWARENESS



“Mr. Duffy lived a short distance from his body.”

James Joyce



MENTAL BENEFITS OF MINDFUL AWARENESS

- Less emotional distress and rumination
- Decreased anxiety, worry, anger, depression
- Increased concentration, emotional intelligence, creativity and problem solving



PHYSICAL BENEFITS OF MINDFUL AWARENESS

- Decrease in stress hormones
- Decrease in heart rate, blood pressure, and hypertension
- Decrease in inflammatory molecules
- Decrease in chronic pain
- Increase in immune function



BEHAVIORAL BENEFITS OF MINDFUL AWARENESS

- Increase in non-reactivity
- Smoking cessation
- Decrease in binge eating
- Decrease in sleep disturbance
- Reduction in alcohol use and illicit substance use



7 ATTITUDES OF MINDFUL AWARENESS





PRACTICE OF MINDFUL AWARENESS

- Find a comfortable position
- Allow your eyes to close if you like
- Remember the 7 attitudes
- Let go of busy-ness or life concerns
- Pay attention to your breath
- When attention wanders to thought, sensation, emotion, etc. - simply notice
- Gently return focus to your breath
- Practice as long as you wish



MINDFUL AWARENESS

“Life moves pretty fast. If you don't stop and look around once in a while, you could miss it.”

Ferris Bueller

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Module 6 - Introducing Veterans to Whole Health Formally and Informally



Using the 'Ask – Tell – Ask' Format:

1. Ask: What is your interest in coming to the VA?

Listen to their response

2. Tell: Share with them how the VA may be able to help, or offer to get them assistance.

3. Ask: What are your thoughts?



Again, using the ‘Ask – Tell – Ask’ Format:

1. Ask: Would you like to hear about some new offerings in the VA that may be of interest to you?
2. Tell: Using visual aids, if available, briefly tell them about Whole Health, using your own words (Elevator Talk). If time permits, or appropriate, this may be a place to briefly share your experience with Whole Health.
3. Ask: Are you interested in learning more about what I have just shared. Possible Responses: “Yes, No, maybe”



IF “NO, MAYBE OR YES”

If their response is “**No**” . . .

- Thank them for listening.
- Ask if they would be interested in you contacting them at a later date about Whole Health?
- Let them know that they can always contact you (or a WH Representative) again at a later date.
- Offer a brochure or card.



IF “NO, MAYBE OR YES”

If their response is “**Maybe**” . . .

- Ask what specifically they might be interested in?
- Offer them further information regarding online information, or any additional offerings at the location.
- Ask if you could follow up with them, or offer to be available if they have further questions.



IF “NO, MAYBE OR YES”

If their response is “Yes” . . .

- Find out how they want to start:
 - More information?
 - A specific class?
 - Health Coaching, TCMLH group, or an online offering?



KEYS TO A SUCCESSFUL FIRST ENCOUNTER

- Find out their immediate interests.
- **Listen . . Listen. . .Listen.**
- Do not pressure.
- Be prepared with a variety of potential information, handouts.
- Have a business card so they can contact you at a later date.



KEYS TO A SUCCESSFUL FIRST ENCOUNTER

- Be as helpful as possible in aiding them navigate the VA, even if they are not immediately interested in Whole Health.
- Offer to be available for them at a later date.
- Do not pressure.
- Thank them for their time, even if brief, or even if they said no.
- **Listen. . . Listen. . . Listen.**



PREPARING A FORMAL WH PRESENTATION

- **“Introduction to Whole Health” – 2 hour presentation**
 - Entire presentation is in the “Additional Resources” section of the Participant Manual, including links to videos and handout copies
 - Scripts are included, however, this presentation is not designed to be read or used as a lecture
 - The more interactive, the more your audience will be engaged!
 - Participate in the 2-hour Virtual Training



PREPARING A FORMAL WH PRESENTATION

- **Considerations if you are doing a shorter presentation:**
 - Determine who the audience is and tailor your presentation to them.
 - Determine the length of your presentation.
 - Choose Material from WH Introduction. (see Additional Resources section in the Participant Manual)
 - Include handout materials available to you.
 - If possible, include an experiential activity.



PREPARING A FORMAL WH PRESENTATION

- If relevant, include your personal story.
 - Practice your presentation BEFORE presenting.
 - Try to use your own words as much as possible.
 - Make sure to include time for questions and discussion.
-
- Offer your presentation to as many audiences as possible (Veterans, Community Agencies, VA Staff, Others???)



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Module 7 – Identifying Stakeholders & Recruitment Strategies



EXAMPLES OF KEY STAKEHOLDERS (P 21-22)

- Chaplain Service
- CIH Practitioners
- Eligibility Staff
- Health Behavior Coordinator
- HPDP Program Manager
- PACT and Mental Health Liaisons
- Patient Advocate/Veteran Experience Officer
- PCMHI Team



EXAMPLES OF KEY STAKEHOLDERS (P 19-20)

- Public Affairs Officer
- Recreation/Creative Arts Therapist
- Transition & Care Management Team
- Veteran Service Officers (VSO)
- Voluntary Service Manager
- Whole Health Coach
- Others ???



ACTIVITY: BRAINSTORMING STAKEHOLDERS

- In small groups, take 6-10 minutes to brainstorm ideas of other key staff within the VA and the community to recruit as a stakeholder and why they are important.
- One person should be the group “recorder” and write down the suggestions.
- Back in the large group, each group reports their ideas.



STRATEGIES FOR RECRUITING VETERANS TO WHOLE HEALTH

- Set up tables or displays in lobby of VA
- Be available as Ambassadors in the VA
- New Veteran Orientation presentations
- New Employee Orientations presentations
- Meet with Veteran groups informally



STRATEGIES FOR RECRUITING VETERANS TO WHOLE HEALTH



- Make brochures, posters and other materials available in appropriate places (waiting rooms, offices, lobby)
- Present to VA staff members at meetings or lunch gatherings
- Provide an opportunity for VA Staff to experience the Personalized Health Planning process
- Participate in VA and community sponsored health fairs



STRATEGIES FOR RECRUITING VETERANS TO WHOLE HEALTH

- Offer to do presentations at Veteran's community groups and service organizations (VSO's)
- Sponsor drop-in Tai-chi, Yoga, Mindfulness classes etc.
- Work with TAPS to present to separating service members
- Online Recruiting –
 - VA facility/site Facebook page?
 - Public community sites?
 - Others??



DISCUSSING AND GENERATING RECRUITING STRATEGIES

1. Assemble in Small Groups
2. Discuss Recruiting Strategies Presented (Pros, Cons, Advantages, Disadvantages) (10 minutes)
3. Generate any new recruiting strategies (10 minutes)
4. Present your groups findings (3 minutes per group)
5. Write down any new ideas on Page 21 of your Participant Manual.

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Module 8 - Engaging Veterans in the Personal Health Inventory



UTILIZING THE SHORT VERSION OF THE PHI

- Advantages:
 - Can be used in brief sessions with Veterans or in Whole Health group introduction sessions
 - Short Version may be completed alone, or you may want to go through it together.
- Once completed, you may ask:
 - What stands out for you now that you've completed this?
 - What really matters to you in your life?
 - In the areas of Whole Health, what's an area you're happy with?
 - What score did you give yourself and what does that mean to you?
 - Where would you like to be?



UTILIZING THE SHORT VERSION OF THE PHI

- What’s an area (or areas, depending on time) you might like to enhance or improve?
 - What score did you give yourself and what does that mean to you?
 - Where would you like to be?
- Would you like to set a goal for yourself around this area? If yes, what might that goal be?
- How could you get started on this?
- What support might you need to help get started and be successful?
- How can I support you?



ACTIVITY UTILIZING THE SHORT VERSION OF THE PHI

- Complete the Short Version of the PHI
- In groups of 4, each take a turn at exploring the PHI with another person in the group.
- Each person will have an opportunity to be the listener and ask the questions.
- You will have 5 minutes to explore with each person.
- Afterwards, in your small group, you will have 10 minutes to discuss. . .
 - What worked well?
 - What could have worked even better?
- Large Group Discussion 10 minutes

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Module 9 - Resources Available to Veterans



RESOURCES AVAILABLE TO VETERANS (P 27-35)

- General resources within VA –
 - Print
 - Multimedia
 - Staff and other key personnel / VA departments / VA Centers
 - Classes
- Specific resources for each of the 8 Components

Remember each VA facility will be slightly different and you will need to populate these pages based on what is available at your location!



ACTIVITY: BRAINSTORMING RESOURCES

1. Think of all the **potential offerings in the VA, community and online** that could be placed in each of the Components
2. Share them with the group
3. Fill in Your Resource Pages as you hear ideas

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Module 10 - Developing Your Elevator Talk



ACTIVITY: YOUR ELEVATOR TALK ON WHOLE HEALTH

- Turn to page 39 in your Participant Manual
- Review the characteristics of an Elevator Talk
- Review the points you may want to make
- Discuss “What would appeal to me about these points?”
- Write the first draft of your Elevator Talk – p. 40

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Module 11 – Experiencing Veteran Resources



EXPERIENCING VETERAN RESOURCES



- Whole Health Experience from site:
 - Tai Chi
 - Yoga, Chair Yoga
 - Qigong
 - Acupuncture
- Presentation from site:
 - Implementing Whole Health strategies



ONLINE WHOLE HEALTH RESOURCES



Whole Health for Intranet: <http://vaww.va.gov/patientcenteredcare>

Whole Health for Internet: <https://www.va.gov/patientcenteredcare>

[Whole Health Print Products Catalogue](#)

[Whole Health/Office of Patient Centered Care & Cultural Transformation Graphics](#)

[Veteran Facing Whole Health Education Handouts *\(Available online or in PDF\)*](#)



OPCC&CT CONTACTS

The National Office of Patient Centered Care & Cultural Transformation can help you on your Whole Health Journey. Please contact the Regional Lead for your VISN.

VISNs 1, 2, 3, 4, 10, 11 Donna Faraone (Lead): Donna.Faraone@va.gov

VISNs 5, 6, 7, 8, 9 Christian DiMercurio (Lead): Carlo.DiMercurio@va.gov

VISNs 12, 15, 16, 17, 23 Amanda Hull (Lead): Amanda.Hull2@va.gov

VISNs 18, 19, 20, 21, 22 Kathy Hedrick (Lead): Kathy.Hedrick@va.gov

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Module 12 - Following Up With Veterans on Their Personal Health Plan



FOLLOWING UP WITH VETERANS ON THEIR PHP

- One of the primary responsibilities of a WH Partner is to support and follow-up with Veterans on their Personal Health Plan (PHP).
- This occurs more than once at agreed upon intervals.
- Make sure to document results of the follow-up and agreed upon next encounter with the Veteran.
- Review questions to ask on Page 37 of your manual.
- Demonstration



ACTIVITY: FOLLOW-UP WITH VETERAN PHP

- In groups of 4, each person takes a turn as a Partner and as a Veteran.
- First, think of a recent behavior you've attempted to change. (You may or may not have been successful)
- One at a time, each person should practice asking the questions on Page 37 of your Participant Manual to another person in the group.
- Each person has 5 minutes to ask the questions.
- After everyone has had their turn, take 5 minutes to discuss what went well and what could have gone even better.
- Meet in the large group again to discuss.

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Module 13 – Limits of the Partner Role



WHEN AND HOW TO REFER

- There may be times when the Veteran you are serving needs additional support beyond what you can offer.
- Know the 5 Signs of Suffering. Review complete description on Pages 63 of your Participant Manual.

know the five signs.

Reach out, connect, inspire hope, and offer help.



personality changed?



agitated?



withdrawn?



poor self-care?



hopeless?

#ChangeMentalHealth

visit

www.changedirection.org



WHEN TO REFER – SOME GUIDELINES

- Participant expresses intent of thoughts of doing harm to self or others
- Participant shows signs of depression
- Participant shows signs of high anxiety
- Participant is unable to make progress in desired area of change
- You seem to have conflicts/value differences with participant that is impeding your relationship
- Trust your intuition



HOW TO REFER

- Establish in first session that referral may be part of the group process
- Discuss with participant first before making a referral
- Use **Elicit-Provide-Elicit** format when discussing referral with participant
- If you have other clinical credentials, be clear with participants which role you are assuming



WHEN AND HOW TO REFER

- Know your local contact person for discussing the situation who can help you with the referral.
- Discuss your observations with the Veteran and offer what services may be available to assist them.
- Do a hand-off with the other service person.
- Offer to continue to be a Partner to the Veteran.
- Be the Veteran's advocate.



PREPARING FOR POTENTIAL REFERRALS

- Have professional colleagues with whom you can discuss concerns
- Be clear on your supervisory chain and to whom you will share
- Be familiar with referral resources
- Recognize that not all client issues are appropriate for Whole Health Groups
- Be familiar with VA limits to confidentiality
- Become familiar with behaviors and signs that might suggest additional resources are needed



QUESTIONS FOR DISCUSSION

- What are some conditions that you think might warrant a referral?
- What has been your experience with referrals in your current position that you could apply to these groups?
- What questions do you have regarding referrals?



THE IMPORTANCE OF SELF-CARE

- Helping others is hard work and can take a toll on us
- Self-awareness and healthy boundaries are critical
- Engage in activities that will replenish you
- Reach out to others when needed

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Module 14 – Documenting Veteran Contacts and Interactions



VETERAN CONTACT LOG – FOR THE RECORD

- The importance of keeping track
- Follow-up contact
- Referring to the appropriate resource
- Making notes about interactions
- Noting Veteran's goal/progress



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Module 15 – Introducing Whole Health to a Veteran



ACTIVITY: INTRODUCING WH TO A VETERAN

- Review the 'Introducing Whole Health to a Veteran Informally . . . Ask-Tell-Ask' slide discussed previously
- Incorporate the content of the First Draft of your Elevator Talk
- Following the activity you will have an opportunity to rewrite your Elevator Talk based on this experience

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Module 16 – Elevator Talk #2



ACTIVITY: REWRITE YOUR ELEVATOR TALK

- In the large group, discuss the activity with inside/outside circles
- Using the second draft box on p. 40, take a few minutes to rewrite your Elevator Talk based on this experience

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Module 17 – Partner Program Planning



PLANNING FOR PARTNER PROGRAM AND TASKS

- Assemble in groups by location.
- Utilizing the template on pages 41-43 of your Participant Manual, draft a plan for implementing the Partner Program at your facility.
- You will have 30 minutes to discuss and brainstorm ideas in your group.
- One person from your group will be the recorder and will report to the large group.



ONGOING SUPPORT AND TRAINING FOR PARTNER ROLE

- Attend the Monthly Community of Practice call for TCMLH Facilitators and Supervisors and other COP calls
- Connect with the site's FIT Partner – Regions & Sites
- Locally, work with your Flagship Education Champion and other Whole Health Pathway staff

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Module 18 – Closing Circle