

# PERSON-CENTRIC WELLNESS MODEL TOOLKIT



# TABLE OF CONTENTS

---

**3** Facilitator Guide

**4** Educational Handout

**4** Presentation | PowerPoint Slides

**5** Checklists

**6** Self-Reflections

**6** Program Evaluation

**7** Resident Assessment

**8** Conclusion

# FACILITATOR GUIDE

---

Created by Mather Institute and based on wellness research, the Person-Centric Wellness Model focuses on the individual and external factors that influence a person's wellness. Senior living providers can use the model to create a community that supports residents' autonomy, affiliation, and achievement, which foster personal growth and wellness.

We've created this toolkit to help you educate your staff and the older adults you serve on the Person-Centric Wellness Model. This Facilitator Guide is the first item in the toolkit, helping to guide you on how to use the difference pieces. When you apply the model in your community, you'll establish wellness as a priority, provide a shared language, and reinforce the importance of supporting Autonomy, Achievement, and Affiliation—what we call the 3 A's.

This toolkit provides the resources you need to implement the model. It contains three sections:

## COMMUNICATION

These materials can be used to introduce the Person-Centric Wellness Model to residents and team members.

- [Well-Being Personalized: The Person-Centric Wellness Model Orange Paper](#)
- A one-page handout summarizing the model

- PowerPoint slides for training team members on the model and/or for resident education

## SELF-REVIEW

These resources can be used to take stock of your existing wellness offerings and community environment to identify strengths and opportunities for improvement.

- Self-Review Checklist for Wellness Programs
- Self-Review Checklist for Community Environment
- Self-Reflection Questions for team members

## EVALUATION

These tools can be used to evaluate support for Autonomy, Affiliation, and Achievement for individual programs, as well as to assess and track changes in residents' levels of the 3 A's.

- Program Evaluation
- Resident Assessment

This document provides guidance and suggestions on how to use the toolkit materials to roll out the Person-Centric Wellness Model in your community. The materials are customizable and available license-free at no cost.

## EDUCATIONAL HANDOUT

This one-page handout provides a concise overview of the Person-Centric Wellness Model. It can be shared with residents and team members during educational sessions on the model to reinforce these key talking points:

- Everyone's wellness journey is unique, and it's important to personalize wellness programs and services.
- A central focus of the model is on supporting the 3 A's, because people are more likely to benefit from wellness programs when they have choices about how to pursue their wellness (Autonomy), they believe they can grow and fulfill their goals (Achievement), and they feel supported by others (Affiliation).
- The environments that we're in can support or hinder our journey of wellness. Consider how individual factors, community factors, and cultural/societal factors can support the 3 A's and individual wellness.

## PRESENTATION | POWERPOINT SLIDES

This PowerPoint presentation may be used to educate team members and residents in your community about the Person-Centric Wellness Model.

Customize these slides to your community and the audience. For instance, the background slides on how the model was developed may be of most interest to leadership and team members in wellness-related roles. This file could also be split into shorter presentations that are delivered over a series of meetings. If possible, add examples that are relevant to your community to bring the concepts to life.

Each slide has notes included in the presentation. These notes can be used as background information for the slide and talking points. There are also several suggested discussion questions to encourage team members to make connections between their role and the Person-Centric Wellness Model.

## CHECKLISTS

One way of systematically evaluating the extent to which your community supports person-centric wellness is by conducting a self-review of wellness programs and the community environment as a whole. This is intended as an exercise to encourage reflection rather than a comprehensive list of all possible ways programs could support person-centric wellness. Consider having team members in different roles complete the checklist to obtain a variety of points of view. It may also be beneficial to ask a group of residents to share their insights.

### PROGRAM SELF-REVIEW CHECKLIST

This may be completed for each existing wellness program. It could also be used to inform the development of new wellness offerings.

### COMMUNITY ENVIRONMENT SELF-REVIEW CHECKLIST

This takes a higher-level consideration of the slate of wellness offerings as well as other features of the community in relation to support for Autonomy, Achievement, and Affiliation.

After examining the results of the self-review, consider ways to incorporate aspects of the 3 A's into more programs (or further develop/enhance them). All programs may not support Autonomy, Achievement, and Affiliation equally. For instance, some programs may prioritize social engagement, whereas others may prioritize learning and personal development. What's most important is that the collection of wellness offerings provides a variety of opportunities that meet a wide range of needs and interests.



## SELF-REFLECTIONS

The self-reflection resources are tools that team members can use to think about how the Person-Centric Wellness Model applies to them and their roles. Select a prompt from each category that feels most relevant to the current moment. These questions may be used for individual self-reflection, topics for regular check-ins with one's manager, or discussion prompts for work teams.

## PROGRAM EVALUATION

Asking residents and team members to complete brief evaluations at the end of wellness programs can provide valuable information for refining and improving wellness offerings. A sample program evaluation form is included in the materials folder.

Questions 1, 2, and 6 measure program satisfaction. Questions 3, 4, and 5 assess Autonomy, Affiliation, and Achievement, respectively.

You are welcome to adapt the program evaluation form to meet the needs of your community.



## RESIDENT ASSESSMENT

This assessment could be used in different ways depending on the needs of your community. It could be administered to residents as an annual survey and results could be tracked over time.

These results may be used to inform decisions about wellness offerings. The assessment could also be used as a conversation tool. For instance, in a one-on-one meeting, residents could share their results with a member of the wellness team as part of a larger conversation about personal wellness goals and available wellness services and programs at the community.

In relation to their wellness goals, discuss what factors are supporting and hindering their sense of Autonomy, Achievement, and Affiliation.

### SCORING THE ASSESSMENT

To understand the level of these characteristics for an individual resident, you will add the scores for each set of two or three corresponding items and average them.

For example, if you want to know the level of Autonomy for a resident, you will add the scores for Question #1, Question #2, and Question #3, and then average them. For a resident who scores a 3 on Question #1, a 4 on Question #2, and a 5 on Question #3, you would add  $3 + 4 + 5$  divided by  $3 = 4$ . The resident has an average score of 4 for Autonomy.

To understand the level of Autonomy for all residents who complete the survey, you will add all of the average Autonomy question scores and divide by the number of survey respondents.

## CONCLUSION

---

Included with your download are all the pieces you need to educate your team members and residents on the Person-Centric Wellness Model.

When Mather Institute developed the Person-Centric Wellness Model, the overarching goals were as follows:

- 1 To advance our/the understanding of wellness by providing a new model based on research
- 2 To better support wellness among residents, customers, and team members
- 3 To enable residents, customers, and team members to chart their own wellness path

The process of developing this model began with a thorough review of existing models of psychological well-being and quality of life. In addition, research in positive aging was investigated to identify factors that could be incorporated into a new model.

For more information on the Person-Centric Wellness Model, please visit [information.matherinstitute.com/person-centric-wellness-model](https://information.matherinstitute.com/person-centric-wellness-model).

Staffed by a multidisciplinary team of researchers, Mather Institute is an award-winning resource for research and information about wellness, aging, trends in senior living, and successful industry innovations. The Institute conducts cutting-edge research, often in collaboration with leading universities, with the goal of informing, innovating, and inspiring. Mather Institute is part of Mather, an 80+-year-old not-for-profit organization dedicated to creating Ways to Age Well.<sup>SM</sup>

(888) 722.6468 | [institute@mather.com](mailto:institute@mather.com) | [matherinstitute.com](http://matherinstitute.com)

