



LOMA LINDA UNIVERSITY
HEALTH

CLEAR Whole Person Care® model, SOUL Spiritual History®, the Loma Linda University Health Wholeness Definition, and the GRETE [Connect] Model History of Development

Background

Throughout the history of Loma Linda wholeness, whole person care and spiritual assessment have been important. Various schools, disciplines and schools have integrated all three (wholeness, whole person care and spiritual assessment) into educational and clinical activities. Up to 2012 there was no corporate-wide understanding of wholeness, whole person care, or a model or tool to guide teaching and practice. In addition, there have been questions of whether spiritual care and whole person care were similar or different concepts. Assessment of all three became challenging. In addition was the question (in 2017) of whether a customer service guide/model could be incorporated within the developing models.

Process authorization

In his role as Vice-President for Spiritual Life, Dr. Gerald Winslow encouraged the Center for Spiritual Life and Wholeness (LLUH Center directed by Dr. Carla Gober-Park) to: 1) the develop a spiritual history/assessment tool, 2) develop a definition for whole person care, and to 3) revisit the wholeness definition since there were several used on the campus. The current documents reflect the history of the development of all projects (development of a definition for whole person care, a spiritual history tool, and the third (revisiting of the wholeness definition). In 2017 a fifth project emerged (with Jennifer McDonald, Carla Gober-Park and Kathy McMillan on the development team).

Projects represented

- 1) Whole Person Care Model
- 2) Whole Person Care Definition
- 3) Spiritual History Tool
- 4) Wholeness definition
- 5) GRETE Connect Model (integrated into the CLEAR WPC Model)

Development process of the above items

2012

1. Spring
 - a. Discussion of all three projects and the similarities and differences between the terms.

- b. Wholeness definition discussed.
- 2. March - *First draft of the whole person care model developed (CLEAR WPC Model)*
 - a. C=Connect, L=Listen, E=Explore, A=Acknowledge, R=Respond
- 3. April to December - Model was refined and went through multiple revisions
 - a. Through open forums, online communities and focus groups, hundreds of employees throughout LLUH provided input.

2013

- 4. Sept to June - The CLEAR WPC Model was:
 - a. Incorporated into selected religion courses to assess how well the model worked in the educational setting.
 - b. Integrated into the orientation process of new employees (LLUHS)
- 5. The SOUL Spiritual History was:
 - a. Developed as a history tool, along with differentiating “history” and “assessment” (history being the shorter version that applies to all disciplines and “assessment” being larger and more discipline-specific).
 - b. Several acronyms were seriously considered for the Spiritual History Tool and all of them were integrated into teaching for the purposes of knowing which one was easier to teach and memorable for the students. The acronym SOUL was selected.
 - S=Sources of strength (*What gives you inner strength and support?*)
 - O=Outlook on religion and beliefs (*What religion, faith group, or belief shapes you most?*)
 - U=Underlying life events (*What significant issues or life events (gains or losses) do you want us to be aware of as we care for you?*)
 - L=Links to care (*What religious practices or beliefs would you like us to consider as we care for you?*)
- 6. The four questions from the Spiritual History Tool were included in the emerging electronic medical record at LLUH (required documentation for new patients and optional documentation for physicians in Family Medicine)

2014

- 7. March - The process of development and testing (in the classroom and orientation of new employees) of both the Whole Person Care model and the Spiritual History Tool was complete.
- 8. March - *The CLEAR Whole Person Care Model and the SOUL Spiritual History Tool were approved by ELC for use throughout the corporation*
- 9. Wholeness definition revisited
 - a. Various groups throughout the campus were invited to submit definitions.
 - b. Submissions analyzed through a qualitative method (for recurring themes)
 - c. Three potential definitions sent to Marketing for feedback – input integrated
 - d. DECISION: to form a definition around three themes: God, health and community
- 10. Two definitions emerged for consideration:
 - a. Loved by God, growing in health, strengthened in community
 - b. Loved by God, growing in health, living with purpose in community
- 11. May - The above two definitions taken to ELC for approval of the process

- a. DECISION: to take the definitions through the following groups for comment: Deans Council, LLUMC Department Head, LLUSS Department Head, LLU Leadership Council, Spiritual Life and Wholeness Leadership Committee

12. June/July – One wholeness definition added through LLUH community feedback

- a. Loved by God, growing in health, living with purpose in community

2015

13. Wholeness academic definition provided through work with School of Religion faculty

- a. Wholeness is: All dimensions of human life integrated through a spiritual core and expressed in [generous] service to others

- b. Guiding principles (taglines): Loved by God, growing in health, living with purpose in community.

14. CLEAR WPC Model integrated within orientation (LLUMC and then the new combined orientation) and into all four years of SM.

15. Research: a) longitudinal research on the CLEAR WPC model, narrative, and health indicators; b) model validation study (to develop and test the model itself)

16. Began taping footage for the film, *A Certain Kind of Light* - documentary film on whole person care through the life of Wil Alexander.

2016

17. The documentary film (*A Certain Kind of Light*) premiered January, 2016 at LLUH. Through the year it was accepted into 18 film festivals (both national and international) and received five awards.

18. Proposal and taping done for the 6-7 smaller films for the CLEAR WPC Model

19. WPC (Love) Rounds made consistent throughout the health system (East Campus, internal medicine, pediatrics)

2017

20. Seven smaller CLEAR WPC films finished taping

21. February: GRETE Connect Model developed (in collaboration with Jennifer McDonald and Kathy McMillan)

22. February: GRETE Connect Model integrated into the CLEAR WPC Model

Guidelines for the development of the projects

The *CLEAR Whole Person Care Model*, the *Spiritual History Tool*, and the *GRETE Model* had to meet the following criteria:

- 1) Measurable: assessable and researchable
- 2) Memorable: easily remembered and identified by an acronym if possible
- 3) Practical: usable in both educational and clinical settings
- 4) Flexible: able to accommodate discipline-specific issues
- 5) Teachable: easily used in the curriculum and educational venues

The *wholeness definition* had to meet the following criteria:

- 1) Short and memorable
- 2) Useful for both marketing and research (wide usefulness)
- 3) Capture the breadth of what we mean by wholeness
- 4) Refer to “God” rather than simply “spirituality”
- 5) Reflect wholeness as a *process* rather than a static end point
- 6) Include a community aspect

Groups involved in development process

The development process incorporated the following people and groups:

1. *Online community*: Over 300 people throughout LLUH continually gave feedback on the various versions of the model
2. *Forum*: all of the above were invited, along with any others who wanted to give feedback, to a forum where there was open discussions around the projects
3. *Focus groups*: led by individuals within the working group
4. *Several student groups*: There was ongoing collaboration with students in the RELR 775 Art of Integrative Care Classes for medical students throughout several quarters (over 300 students over the time period)
5. *Consultants* (individuals): Elizabeth Johnston Taylor, Judy Storfjell, Adam Arechiga, Danny Fontoura, Olivia Moses, Barbara Hernandez, Don Sease, Tony Yang, Dora Barilla, Jerry Winslow, Wil Alexander, Harvey Elder, Ron Carter, Marilyn Eggers, Helen Staples-Evans, Nancy Testerman (and many others)
6. *Consultants* (groups): deans, staff development, academic deans and educators, OWL Council, spiritual leadership group, administrative committee of the Center for Spiritual Life and Wholeness (LLUAHSC group), LLUMC Department Head, LLUSS Leadership group, LLU Leadership Group, Deans Council, Executive Leadership Committee (ELC)
7. *Consultants* (outside LLUH): varied
8. *Working Group (Whole Person Care Model and Spiritual History Tool)*: A smaller group from throughout the corporation distilled all the input received from the larger groups (representing administration, clinicians, faculty, schools): Carla Gober (chair), Aly Benitez (Murrieta), Hazel Curtis (Murrieta), Vaughan Grant (CPE supervisor), Jim Greek (chaplain), Kris Lozano (CSLW), Fred Kasischke (dentistry), Iris Mamier (nursing), Kathy McMillan (employee spiritual life and wholeness), Renae Reiswig (staff development) Kathy Rolle (nurse educator), Terry Swenson (campus chaplain), John Testerman (medicine), Lance Tyler (chaplain)
9. *Working Group (Wholeness Definition)*: Carla Gober (chair), Aly Benitez (Murrieta), Hazel Curtis (Murrieta), Danny Fontoura (Wholeness Institute), Vaughan Grant (CPE supervisor), Jim Greek (chaplain), Kris Lozano (CSLW), Fred Kasischke (dentistry), Iris Mamier (nursing), Kathy McMillan (employee spiritual life and wholeness), Olivia Moses (Employee Health), Renae Reiswig (staff development) Kathy Rolle (nurse educator), Terry Swenson (campus chaplain), John Testerman (medicine), Lance Tyler (chaplain), Tony Yang (Public Affairs)
10. *GRETE Working Committee*: Jennifer McDonald, Carla Gober-Park, and Kathy McMillan (in collaboration with Lyndon Edwards and Ad Com for the CSLW).

Current and future activities (2015 and forward)

- Conference on Whole Person Care – incorporating the model (2015)
- Orientation of all new employees using the WPC model – currently taking place for all new LLUHS employees; planned for all new LLU employees
- Grand Rounds around Whole Person Care (using the CLEAR model)
- Integration of CLEAR Whole Person Care model in all years of School of Medicine (2012-present)
 - First year - *Orientation to Religion and Medicine*
 - First year - *Wholeness for Physicians*
 - Second year - *Art and Science of Whole Person Care*
 - Third year - integrated into clinical rotation (Amy Hayton)
 - Fourth year - *Whole Person Care Elective*
- Integration of the CLEAR Whole Person Care into School of Nursing (2015-present)
 - Introductory lecture
 - Incorporated into various courses
- Integration of the CLEAR Whole Person Care model into School of Religion
 - Incorporated into various courses
- Incorporation of SOUL Spiritual History Tool into electronic medical record of the clinical area (2015-present)
- Documentary film (short-form) created entitled *A Certain Kind of Light* to tell the story of whole person care, the development of model and its use on campus and beyond (2016)
 - Film premiered at 18 film festivals internationally, including London, Rome, and Los Angeles
 - Won five awards for best documentary
 - Slated to air on PBS *Life on the Line*
 - Screened at health systems, churches and community groups across the nation
- CLEAR Whole Person Care model slated for further integration into curriculums of School of Allied Health Professions, School of Behavioral Health, School of Dentistry, School of Pharmacy, School of Public Health
- Development of workbooks and toolkits for individual (personal and patient), professional (healthcare givers in all disciplines) and entity use (healthcare and educational institutions)
- Development of six smaller films to teach the model; One overview film and one on each of the five aspects of the CLEAR WPC model
- Presentations at conferences
 - *Poster Presentation - Congress on Whole Person Care, McGill University, Montreal Canada.*
 - Carla Gober (accompanied by Kris Lozano) gave a poster presentation on the ongoing development of the Whole Person Care model (McGill University in Montreal Canada in October, 2013).
 - *Workshop and Paper Presentation - Religion and Medicine Conference,*

Houston, TX –

- Carla Gober-Park, Chintan Somaiya, Kris Lozano and Tamara Thomas presented a workshop and paper presentation on the CLEAR WPC model, the film and narrative research
- Articles for publication
 - Currently in process of writing several articles for publication on CLEAR WPC model with representatives from LLU schools, LLUHS clinicians and Employee Spiritual Care.
- Research projects
 - Longitudinal study that looks at personal wholeness related to the five areas of the model: CONNECT, LISTEN, EXPLORE, ACKNOWLEDGE, RESPOND
 - Validation study of the CLEAR Whole Person Care model
 - Pediatric Residency qualitative research on student use of the CLEAR Whole Person Care model
- All employees, faculty, clinicians and students will be introduced to CLEAR WPC model and larger Whole Person Care Initiative in the following ways:
 - CLEAR WPC model curriculum developed to include:
 - Workbooks (facilitator and participant)
 - WPC documentary film called *A Certain Kind of Light*
 - Six CLEAR WPC model films (one overview and one film on each model aspect)
 - CLEAR WPC model curriculum (identified above) integrated into following populations/entities:
 - Courses in all each of the eight schools at LLU
 - Physicians and Residents (current and new)
 - Orientations
 - On-going mentoring
 - Faculty/employees in LLU, LLUSS, LLUH (Current- those hired 2015 and previous as well as integrated into new-hire orientations)
- 2017 – Working conference (select working group) designed to fine-tune curriculum development around the CLEAR WPC model