



# YOUR BRIDGE TO BETTER: A Well-Being Journey

## FACILITATOR GUIDE

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**Your Bridge to Better: A Well-being Journey**

**Facilitator Guide**



## Introduction

Welcome to the Bridge to Better Well-being Champion program. The Building Resiliency Intersectionality During Graduate Education, or BRIDGE, grant-funded initiative is the first program developed to address the pervasive issues of stress, burnout, depression and suicide among medical students. Developed and led by medical students, these sessions provide knowledge and access to the tools students need to manage their stress and improve their well-being as medical students now and physicians in the future.

One of the BRIDGE program's goals is to launch a Well-being Workshop Series and a Well-being Champion program for the Family Medicine Interest Groups' medical students. Through the grant, we identified six topic areas for improvement for the well-being of medical students:

1. Building trust and cultivating relationships
2. Resiliency
3. Burnout prevention
4. Substance use prevention
5. Indebtedness
6. Suicide prevention

The AAFP searched nationwide for students to partner with us to build a curriculum for the workshop series. In spring 2022, five students from four universities joined the Well-being Champion program. The students continue to work alongside the faculty chair, Dr. Catherine Florio Pipas, and other Physician Health First faculty to build curriculum and deliver sessions.

The five students developed this facilitator's guide as part of the program to lead the next group of Well-being Champions in delivering these sessions to future students. The guide allows the Well-being Champions to facilitate all the workshops at their university and cater the topics to the needs of their audience.

In this facilitator's guide, you will find information on the title, content, delivery method and resources, along with tips and tricks for preparing for the sessions. You can always contact AAFP staff and faculty with questions, guidance or resources you may need to implement best practices within these sessions.

# **Navigate Medical School While Caring for Your Personal Well-being**

## **Walk the Walk**

Congratulations on taking this step to become an [AAFP FMIG Well-being Champion](#). You will facilitate sessions that will stimulate reflection, discussion and change toward a culture of well-being in medicine. In addition to promoting well-being, it is important to practice the strategies we teach and emulate the culture we advocate for. Being a Well-being Champion can inspire others to care for their well-being. Change can start with you as you “walk the walk” of well-being.

## **Personal Health Improvement Plan**

We all have areas in our lives that we want to improve. A straightforward way to set goals and make actionable steps towards them is with a Personal Health Improvement Plan. A PHIP is a plan to help prioritize health by continuously focusing on a **Specific, Measurable, Achievable, Relevant, Timely, or SMART**, well-being goal. This is a goal that you set for yourself to improve your well-being. For example, you could set one or more of the following goals for your personal well-being:

- I will take 10 minutes to sit quietly three times a week.
- I will start a food diary to assess my eating habits for 30 days.
- I will get eight hours of sleep five nights per week.
- I will set a daily 15-minute timer for scrolling social media at 7 a.m.
- I will take a 30-minute walk on Monday, Wednesday and Friday mornings.

After setting a goal, a PHIP will guide you through a series of exercises to determine the likelihood of achieving the goal, identify factors that threaten the goal and define metrics to measure progress. This well-being plan will start today and last for 30 days or more.

You can complete the [Personal Health Improvement Plan worksheet](#) at the bottom of the article or [myphit.org](#). Setting goals for yourself and going through the process will help you reach personal goals and understand what you are encouraging your peers to do.

# Get to Know the Material

This section explains all aspects and materials needed to facilitate the five sessions. All sessions have corresponding PowerPoint presentations, scripts, activities and videos. You will better understand the materials by reading each session's description and script, reviewing the presentation and understanding the pitch.

While we want you to adapt the script to your audience, please do not change the titles or slides. Check out the addendum at the end of this guide to access the PowerPoint slides and worksheets.

## PowerPoint Presentations

Each session has a PowerPoint presentation that accompanies the topic. The slides contain the script, so review and familiarize yourself with the topic. Review the recorded sessions presented by previous champions for clarity and additional support. Click [here](#) to view the PowerPoint slides and a video.

## Script

The scripts are in the 'Notes' section of the PowerPoint decks. Since it is a living presentation, you're encouraged to edit the script for your audience. Familiarize yourself with the content and make it your own. More comfort with your material will allow you to easily cater the content to your audience during your presentation.

## Pitch

A pitch is listed for each session to be used for the marketing materials.

## Activities

Depending on your presentation, you may have various formats for planned activities during your session. These activities include think-pair-share, interactive word clouds or polls, private reflections, breakout rooms, in-person group discussions and many more. Plan for what materials or technology you may need to host different activities. Refer to Chapter 3 to consider technology options.

Keep in mind your audience when providing instructions. You may have to consider keeping them in view if hosting a virtual activity, creating appropriate group sizes and setting norms for privacy if sharing sensitive information.

## Videos

Professional recordings or recordings of Zoom sessions are available. Many of these recordings include interviews and stories which may be used during your sessions. Click [here](#) to view the videos.

## Session Details

### Session 1 – Burnout and Well-being: Introduction to Safeguarding Your Wellness and Averting Burnout

**Objectives:** At the end of this session, participants will be able to:

- Define burnout and well-being
- Describe the characteristics and prevalence of burnout

- Classify factors that contribute to burnout and its impact on physicians, their teams, systems and patients

**Method of presentation:** Live, virtual or hybrid interview podcast and video with Dr. Catherine Florio Pipas

**Time needed to present:** 60 minutes

**Pitch:** Your well-being is critical to your effectiveness in every aspect of your life. We will explore the causes and ways to identify burnout in ourselves and others. This presentation prepares you for other sessions on how to take actionable steps to safeguard your well-being.

**Materials needed:** Video and worksheet

**Learning activities:** N/A

## Session 2 – Permission to Be Me: Prioritize Personal Well-being

**Objectives:** At the end of this session, participants will be able to:

- Describe the impact of perfectionism on personal well-being
- Apply skills to practice self-compassion
- Assess strengths, weaknesses, opportunities and threats, or SWOT, in the context of personal well-being
- Prioritize well-being by designing a PHIP

**Method of presentation:** Live, virtual or hybrid

**Time needed to present:** Minimum of 60 minutes, maximum of 90 minutes

**Pitch:** In this session, you will develop an understanding of personal well-being in the context of perfectionism in the medical field. Participants will hear stories and learn skills to practice self-compassion and prioritize their well-being.

**Materials needed:** PHIP worksheet and SWOT analysis

**Learning activities:** Self-compassion exercise, SWOT analysis, PHIP

## Session 3 – Tools for Success: A Series of Strategies for Students to Sustain Well-being and Prevent Burnout – Book Club (12 sessions)

**Objectives:** At the end of this session, participants will be able to:

- Discuss challenges across social, physical, emotional, environmental, intellectual, financial and spiritual well-being
- Apply evidence-based well-being strategies
- Demonstrate self-assessment and self-reflection skills
- Create and sustain a PHIP

**Method of presentation:** Hybrid, full and small-group discussion about the book

**Time needed to present:** 60 minutes multiplied by 12 sessions (one session/chapter)

**Pitch:** Welcome to your journey of improved personal health. In this session, you will embark on a series of monthly seminars on wellness strategies through evidence-based studies. We will discuss real medical cases in small groups, draw on the lived experiences of patients and apply well-being techniques to our own lives to prevent future burnout.

**Materials needed:**

- Dr. Catherine Florio Pipas' book, *A Doctor's Dozen: Twelve Strategies for Personal Health and a Culture of Wellness*
- If in person, food or lunch/dinner provided can encourage attendance
- Materials needed for specific sessions (e.g., paper for reflective journaling)

**Learning activities:**

- Activities vary by session and allow for creativity and ingenuity
- Example: mindfulness session (e.g., boxed breathing, body scan)
- Question session: reflective journaling, active discussions and listening to others' journal entries

**Tip:** As you go through the book club, not all slides will be necessary to show as you complete the chapters. Hide the slides of the completed chapters, and always keep slides 1-9 active, as you will still need attendees to check-in.

## Session 4 – Keep Your Tank Full: Substance-free Strategies for Stress Management

**Objectives:** At the end of this session, participants will be able to:

- Describe the stress cycle and physiological, emotional and behavioral signs of stress
- Compare healthy and unhealthy coping mechanisms
- Assess and recognize self-stress and self-management skills
- Discuss national and local resources for support

**Method of presentation:** Presentation with mindfulness exercises

**Time needed to present:** 80 minutes

**Pitch:** In this session, you will learn how to manage stress as a medical student, and we will discuss substance-free strategies for stress management. Learn your manifestations of stress, create an individualized stress management plan and engage with peers and local resources/experts in behavioral health for medical students.

**Materials needed:**

- One piece of paper and a pen/pencil per participant
- Print out the worksheets for participants found throughout the [Creating a Healthier Life: A Step-by-Step Guide to Wellness](#)
- Poster board/flip chart (six total)
- Sticky notes

**Learning activities:**

- Present stress cycle information
- Group discussion questions with a flip chart and student story
- Mindful journaling
- Introduction to creating a stress management plan
- Question and answer session with a local expert

**Session 5 – Financial Well-being: Managing My Finances and Debt Today and Into My Future**

**Objectives:**

- Describe personal goals for loan repayment, forgiveness, savings and retirement
- Define expenses, debt and income
- Track short- and long-term financial goals for yourself and your philanthropy

**Method of presentation:** Interview session with Dr. Jason Marker and resources; can be formatted virtually or in a hybrid format

**Time needed to present:** 60 minutes

**Pitch:** In this session, you will engage in a well-being discussion that helps you identify and address your values about money. In this brief overview of economics, we cover the individual, medical economics and building a budget as a medical student to achieve financial balance and well-being.

**Note:** Be careful not to make assumptions regarding the finances of your audience. This session is not meant to teach you how to live the most frugal life possible. It is about achieving financial balance and well-being in your life. Before the breakout session, encourage students to maintain the privacy of information shared during the session. For instance, if a student discloses tips for applying to Medicaid as a student, it is important to remind others to respect one another's privacy after the session ends.

**Materials needed:** Recording of Dr. Marker's Medical Economics 101

**Learning activities:**

- Dr. Marker's presentation on Medical Economics 101
- Breakout discussion on budgeting

**Session 6 – Say Something: Physician Suicide Awareness and Prevention (see bonus material)**

This one-hour webinar workshop is designed to offer a supportive and safe environment for open dialogue related to mental health and suicide ideation. Students will gain knowledge of tools and resources to intervene for themselves or their peers. Dr. Timothy Riley is leading this session for three audiences: students, residents and physicians.

**Session wrap-up:** Summarize key points from the session through slides at the end of the presentation or a brief verbal synopsis of the topics. The most effective way to reiterate key points is through an interactive activity that engages the audience (e.g., session about mindfulness with a body scan or boxed breathing activity).

Remember to leave five minutes at the end of the session to allow your audience time to do a post-evaluation. We use the data from the completed evaluations to gauge the session's impact and encourage well-being for medical students in more universities.

Immediately following your session, please complete your recap form. It provides us with attendance and feedback information.

# Prepare Before Your Session

## University and Family Medicine Support

Enlist the help of a school faculty member or administrator whose responsibilities overlap with the well-being topic of your presentation. It could be the counseling center or financial aid advisor. Contact them about collaborating or potentially co-presenting with you. Your school's student FMIG and other relevant student interest groups might be able to help with promoting your presentation to a wider audience of medical students.

## Date and Time

- Review your school's curricular and extracurricular calendars for dates and times that are less busy. The university's student affairs and medical school's communications offices might be good places to start for learning about other events occurring on campus and at your medical school and scheduling the date and time of your presentation.
- Schedule your event around class exams (especially if exam schedules differ between preclinical and clinical years).

## In Person, Virtual or Hybrid

- Determine if you are having your event in person, virtually or creating a hybrid experience. This will determine whether you need to schedule a room and/or provide refreshments.
- In-person events can allow more engagement with the audience, but it can be challenging to accommodate on-site schedules. Having a hybrid option can alleviate scheduling conflicts.

## Registration

- Program champions will distribute the registration link the AAFP provides
- Participants will sign up through the link
- Sessions will be added to students' calendar
- Students will complete a one-time demographic survey

## Technology

The technology used will vary based on the following modes of presentation:

- **In person:** The student affairs office can often help with room scheduling. However, visit the venue before the event to ensure you can operate the computer and/or projector and have the correct equipment or can acquire it. Contact your university's IT department if you're unsure how some technology works.
- **Virtual:** Determine which technology you will use to present virtually (i.e., Zoom, Webex, Teams) and familiarize yourself with how features work, such as sharing your screen. If your school uses a particular technology, it's best to employ it.
- **Hybrid:** One of the most significant challenges when providing a hybrid experience (virtually and in person simultaneously) is the people viewing virtually may not be able to hear you speaking if you are away from the microphone. Ask if your school has microphones you can use while presenting to in-person and virtual audiences simultaneously. While presenting, consider your position and decide if you can effectively present to both groups at once or if you need a co-presenter to help facilitate both groups.

## Tasks for the Modes of Presentation

- **In person:** Ask a fellow student or staff member to help you acquire session supplies, set up the room and help with check-in. This person can help with catering or food drop-off. Someone else who is aware of the session and your goals can be beneficial to scribe or co-lead activities, as well.
- **Virtual:** Enlist the help of a chat moderator to help answer questions or address technology issues while you present. This person can also help facilitate discussions in breakout rooms. Sometimes attendees are reluctant to participate. Having someone prepared to “break the ice” or answer predetermined questions can encourage participation from everyone in the session.
- **Hybrid:** A chat moderator for a hybrid session, much like a virtual session, is helpful when multi-tasking and presenting.

## Supplemental Videos

Refer to Chapter 2 for information on online resources for each session.

## Practice, Practice, Practice

Spend time rehearsing your presentation and doing a trial run in front of friends. The session notes are in the ‘Notes’ section of the PowerPoint slides. As part of your script, start there and build your talking points around the existing session notes. Doing this will help you feel more confident and prepared when your presentation day arrives.

## Pre- and Post-evaluation

Links will be sent from the AAFP for attendees to complete pre- and post-evaluations. These results will help the AAFP assess the success of this program.

## Share Stories (with permission)

When there are recorded videos to present, individuals may have given the AAFP permission to use their stories. When you are in person with your peers, let the group know that the information shared in the session is not to be shared with others. Maintaining respect for others’ privacy in and out of the session is important to create a safe place for your peers to be comfortable sharing their stories, leading to a richer experience for attendees.

## Plan Refreshments/Food

- Find out if your school has any limitations on food being served at student events.
- Serving a meal or high-quality snacks or drinks is an excellent way to draw students to your session. In addition to meals catered by local restaurants, think about serving coffee/tea or a dessert to distinguish your presentation from other events hosted on campus. Plan 10-15 minutes before the start of your presentation for serving food.
- Secure funds for the meal, cups, napkins, plates and silverware
- Contact the caterer far in advance of your event
- Arrange for someone to pick up the food
- Create a sign-in system to ensure those who registered in advance receive a meal
- For virtual events, think about sending out gift cards to attendees after the event using their email. While it’s not quite the same as dining in person, the gift card can be a nice thank you to attendees.

Contact your local FMIG and national FMIG for funding your event. You can even apply for an AAFP FMIG grant to bolster the funding of the session. Contact Adam Bradley ([abradley@aafp.org](mailto:abradley@aafp.org)) for more details.

### **Ask for Help**

Peer support for your presentation may take many forms. Your institution's FMIG, primary care-related club, finance club or business club may be willing to help fund, host and/or promote your event. Ask friends and fellow Well-being Champions to attend the event and support you. A friendly face in the crowd will help ease your nerves while presenting. During the discussion, having friends in the audience and breakout rooms also can help facilitate or engage the conversation.

### **Engage Your Institution**

If your institution allows it, add your sessions to the university calendar to boost attendance and let other medical students know you support their well-being.

### **National AAFP Support**

Contact Adam Bradley ([abradley@aafp.org](mailto:abradley@aafp.org)) to ask how the AAFP can support your efforts. The AAFP can help in many ways, from financial resources to media assistance.

### **Promotion**

The AAFP created a [sample flyer](#) in which you can fill in your presentation details. Simply click on the link, download the flyer, fill in the boxes with your information and you can print or share the PDF to promote your event.

# Present With Confidence

## Present Naturally

- Keep your tone conversational and informal so the audience finds it easier to relate.
- If the presentation is in person, use hand gestures and walk around the stage or from one end of the room to the other so the position of the speaker (you) changes and the audience does not get easily bored.
- Avoid using verbal pauses like “um,” “uh” or other fillers. Instead, pause between blocks of your presentation and summarize what you’ve already said.

## Engage Every Level of Learner

- Schedule your event for dates and times that don’t interfere with examinations and look for opportunities to engage every level of learner (i.e., M1, M2, M3, M4, resident).
- To engage students on their clinical rotations, determine which communication mode works best to entice them to attend. Use a GroupMe or email listserv to contact the maximum number of students with the least time and effort.
- Negotiate with your school’s clerkship directors, so students receive credit for attending your session. This can greatly increase student engagement for M3 and M4 students, in particular.

## Be Flexible and Adapt

There can occasionally be hiccups for even the best-laid plans, so prepare each presentation or session with a backup plan for the following issues:

- Technology: Ensure someone familiar with the technology and readily available is in the room or on close standby.
- Attendance: Remember that medical students are busy, so attendance may not be as robust as you might hope. Keep alternative dates in mind and always plan sessions around exams and breaks.
- Food: Order enough pizza or other food to ensure those present for the session get fed on a first-come, first-serve basis.
- Be prepared for a virtual or live delivery format if an unforeseen event causes you to pivot.
- The presentation does not need to have a rigid format. It is okay to adjust your session with the natural flow of the discussion. Having a truncated version of each portion of the presentation is helpful if/when the group spends more time on a specific topic than you had planned.

## Post-session Follow-up

### Evaluation

Make sure to include the evaluation QR code on your final slide. Allow five minutes at the end of your presentation for the evaluation before leaving the session. Asking audience members in person immediately after the completion of the session for feedback while the information is fresh in their minds is key.

Having participants complete an end-of-session survey allows for feedback that helps the AAFP measure the efficacy of Your Bridge to Better presentation. Results are shared with HRSA, and survey responses will hopefully encourage HRSA to continue funding important projects like this.

### Future Sessions

Remember to remind participants about future sessions and share the FMIG calendar.

### Follow-up With the AAFP

Submit receipts to Adam Bradley ([abradley@aafp.org](mailto:abradley@aafp.org)) and attendance sheet to Nicole Johnson ([njohnson@aafp.org](mailto:njohnson@aafp.org)).

## Planning List

### Know the Material – 1-2 Months Prior (Chapter 2)

- Review the session PowerPoint
- Review the session script and adapt it to your audience and presentation style
- Identify session activities that may be most beneficial to your audience
- Identify local guest speakers to share personal narratives or discuss local resources, if indicated. If you're unable to identify someone, search the AAFP video archives to present relevant narratives.

### Prepare Your sessions – 1-2 Months Prior (Chapter 3)

- Contact AAFP program staff, other AAFP FMIG Champions, local and national student support from FMIG and/or other specialty interest group partners
- Contact local school support from faculty or departments (i.e., FMIG advisor, behavioral health department), as well as content specialists and guest speakers
- Set up your workshop date and communicate with the AAFP for marketing assistance
- Decide your mode of presentation: in person, virtual or hybrid
- Reserve your event space, if applicable
- Request local IT support and coordinate with the AAFP, if applicable
- Determine funding for food and refreshments through the AAFP or your university

### Promotion – 2-4 Weeks Prior

- Finalize session information for the AAFP website
- Identify your target audience
- Advertise your session via emails, posters, social media, group chats and/or word-of-mouth
- Activate local support to help spread the word about your session
- Identify students who share the values of well-being to help scribe or lead activities; these individuals can help promote the session to their network
- Set a soft deadline to register

### Last Steps – 1 Week Prior

- Rehearse your presentation and practice timing
- Promote the session with a final push to register participants
- Acquire necessary supplies for workshop activities
- Recruit a co-presenter or helper to assist with issues that may arise during the presentation
- Confirm catering order
- Confirm guest speakers
- Confirm IT support
- Send a reminder email to registered participants with workshop details (1 day prior)
- Confirm catering delivery or pick-up details (1 day prior)

## **During Your Session**

- Engage your audience
- Have fun and show your passion for the topic
- Embrace that not everything may go as planned and be flexible
- Be open and honest with your audience

## **After Your Session**

- Set a follow-up workshop and/or means to stay involved with participants in the future
- Send thank you notes to guest speakers
- Send thank you emails to registered participants

## **Addendum**

### **PowerPoint Slides and Worksheets**

Visit our [AAFP FMIG Well-Being Champion](#) webpage to access

# YOUR BRIDGE TO BETTER: A WELL-BEING JOURNEY

## CHAMPION PRESENTER HOW-TO GUIDE

### Schedule Your Session with AAFP

Please follow the QR code or link below to schedule your session.

When completing the question regarding presentation location:

- Sessions held in-person only, will not be publicly advertised.
- Sessions presented virtually and hybrid, will be advertised to all participating Well-Being Champion programs.

After completing the form, you will receive an email containing:

- Session registration confirmation
- Advertising materials
- PowerPoint Presentation
- Notes
- Accompanying participant worksheets

### Check In During Session

In your presentation, there will be a slide for attendees to check in. Please reserve a few minutes to allow attendees to check in.

### Evaluation

At the end of the session, there is a QR code to scan for completing the evaluation. It is very important to add time for attendees to take the 5-minute evaluation. Results from the evaluation allows AAFP to support medical students with resources for their well-being.

### Links to Resources

Resource Center
