First STeps ACP Facilitator Certification course Agenda

7-Hour and 8-hour courses

**Note to First Steps Instructor:**

* This document provides guidelines for teaching the First Steps ACP Facilitator Certification course as

1. a 7-hour course that defers the final competency role-play validation, or
2. an 8-hour course that includes the final competency role-play validation for awarding certification.

One PowerPoint (RC 1100) is provided for teaching either course. Customize the PowerPoint by hiding slides based on the course type, i.e., Learning Outcomes slides, Summary slides, and Final Competency Role-Play (For 8-Hour Agenda) slide.

* Use the PowerPoint (RC 1100) and refer to the INSTRUCTOR NOTES to ensure fidelity in teaching core content and competency evaluation expectations. The Power Point INSTRUCTOR NOTES are provided to assist you in delivering the key content for this standardized curriculum and help you stay on track with the agenda. Of course, you will need to add customized content, as appropriate, and integrate relevant stories and examples.

**Pre-Course Requirements for Participants:**

1. Complete Respecting Choices **First Steps® ACP Facilitator Online Core Curriculum (modules 1–4)**.
2. Complete **Personal Engagement Activity**.

**Purpose:** To gain an understanding of common reactions that people have regarding advance care planning (ACP).

**Instructions: Attempt to have a conversation with a loved one or close friend. Ask this person the following questions:**

* What is your understanding of advance care planning?
* What type of advance care planning have you done, if any?
* What fears or concerns do you have about this type of planning?

**You will be asked to share in class what you learned.**

1. Review the **Advance Directive document** appropriate for your organization/community (or distributed by your ACP team).

**Purpose:** To increase awareness and understanding of the advance directive used in your organization/community.

### **AGENDA, documents, and instructor tasks**

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| **8:00 am** | **Registration** |
|  | **INSTRUCTOR TASKS:** Provide a complete set of course materials for the day.  Ensure that all participants sign in. (Customize sign-in sheet to meet your organization’s continuing education provider requirements.) |
| **8:30** | **Welcome and Overview** |
|  | * Welcome * Introduction of Faculty/Instructors and participants   o Optional warm-up activity   * Overview of Respecting Choices * Overview of learning outcomes and materials |
| **RC 1101 – First Steps ACP Facilitator Certification 7.0 and 8.0-hour Course Agenda**  **RC 1100 – First Steps ACP Facilitator Certification Course PowerPoint (with INSTRUCTOR NOTES)** |
| **INSTRUCTOR TASKS:** Welcome participants.  Introduce Faculty/Instructor (and other staff as appropriate).  Introduce participants. Use some type of warm-up activity. For example, ask, *“What one skill would you like to learn today?”* Record responses on flip chart.  Thank participants for completing the First Steps ACP Facilitator Online Curriculum. Provide housekeeping instructions and ground rules for storytelling.  There will be a need to manage participant questions while completing the course agenda. Remind auditors to write questions for discussion at breaks, lunch, or after course.  It is helpful to have a flip chart to record issues that are important but outside the scope of the course objectives. Document these “Future List” issues that may require follow-up activities.  Review agenda **(RC 1101)** and orient participants to course materials. |
| **9:00** | **The Personal Engagement Activity** |
|  | * What did you learn when attempting to have an ACP conversation? |
| **INSTRUCTOR TASKS:** Review the purpose of this activity: To gain an understanding of common perceptions that people have regarding ACP and the importance of personally engaging in the work of advance care planning.  Listen for and summarize common themes that emerge for group learning.  Remind participants to continue to have ACP conversations for personal insights into strategies to engage others to participate in ACP. |
| **9:15** | **First Steps ACP Conversation Guide (for adults who have not started, or engaged in, a planning process)—Facilitation Skills** |
|  | * Communication Skills card (RC 0046) and additional techniques |
| **First Steps ACP Conversation Guide (RC 1143): Healthcare agent not present** |
| * Video: *First Steps ACP Introduction (7 minutes)* * Group debrief: What skills did you observe? * First Step ACP Introduction Guide (RC 1132) |
| **RC 0046 – Communication Skills card**  **RC 1143 – First Steps ACP Conversation Guide**  **RC 1132 – First Steps ACP Introduction Guide**  **Video: *First Steps ACP Introduction*** |
| **INSTRUCTOR TASKS:** Refer to the PowerPoint INSTRUCTOR NOTES to guide participants through the course content and the materials.  The *green* Conversation Guide **(RC 1143)** is intended as an introduction to ACP for individuals who have not started, or engaged in, ACP.  Remind participants that this video focuses on how to introduce ACP and create a follow-up plan.  Following the video *Group Debrief*, ask participants to pull out the Introduction Guide (**RC 1132)***. The introduction in the video can be delegated to other members of the ACP team who could use RC 1132 as a consistent approach.* |
| **9:45** | ***Break*** |
|  | **INSTRUCTOR TASKS:** Providerefreshments. |
| **10:00** | **First Steps ACP Conversation Guide (RC 1143): Healthcare agent present** |
|  | * Video: *Conversation with Individual and Agent: Exploration* *(19 minutes)* * Group Debrief: What skills did you observe? * **Video: *Conversation with Individual and Agent: Goals of Care* (*8 minutes*) (NOTE: No group debrief)** |
| **Video: *First Steps ACP Conversation with Individual and Agent: Chapter 1 – Exploration***  **Video: *First Steps ACP Conversation with Individual and Agent: Chapter 2 – Goals of Care*** |
| **INSTRUCTOR TASKS:** Remind participants that the videos are intended to demonstrate ACP facilitation skills and strategies to include the healthcare agent in the conversation.  Ask participants to follow along on the *green* Conversation Guide **(RC 1143)**. |
| **11:00** | **Practice Exercise Role-Play 1 *(work in groups of three)*** |
|  | * First Steps ACP Conversation Guide |
| **RC 1143 – First Steps ACP Conversation Guide**  **RC 1135 – First Steps ACP Role-Play #1 – Green**  **MC520 – Information Card for Healthcare Agents (or other distributed by your ACP program)**  **RC 0075 – The Role of the Instructor as Mentor in Promoting Facilitator Certification and Maintenance of Competence** |
| **INSTRUCTOR TASKS:** Review PowerPoint slide for this activity and INSTRUCTOR NOTES.  Decide how to assign participants to role-play groups that include three (3) participants per role-play group (e.g., count off or stay at table).  These role-play exercises help participants use and understand the standardized conversation guides.  Faculty/Instructors should describe their role as observer during the role-play exercises to provide real-time feedback and “teachable moments.” Review the Role of the Instructor as Mentor in Promoting Facilitator Certification and Maintenance of Competence **(RC 0075)** that describes how to provide “teachable moments” during role-play exercises.  When team teaching, Faculty/Instructors should make a plan to observe specific groups (avoid crossing over between groups if possible). |
| **11:45** | **Group debrief: What skills did you learn?** |
|  | **RC 1134 – Instructor Guide: First Steps Standardized Role-Plays** |
| **INSTRUCTOR TASKS:** Group debrief: Reconvene participants. All Faculty/Instructors participate and contribute 1–3 observations. Review the Instructor Guide: First Steps Standardized Role-Plays **(RC 1134)** that provides a summary of the role-play themes for debriefing.  Keep the focus on ACP facilitation skills. Listen and summarize themes for group learning. Consider writing themes on flip chart. |
| **11:50** | **First Steps ACP Conversation Guide: Adults with Chronic Illness (for adults who have not started, or engaged in, a planning process)—Facilitation Skills** |
|  | * First Steps ACP Conversation Guide: Adults with Chronic Illness (RC 1145) * What’s different? * Video: *First Steps ACP for Adults with Chronic Illness (14 minutes)* * Exploring understanding of illness, experiences, and living well * Group debrief: What skills did you observe? |
| **RC 1145 – First Steps ACP Conversation Guide: Adults with Chronic Illness**  **Video: *First Steps for Adults with Chronic Illness*** |
| **INSTRUCTOR TASKS:** Refer to the PowerPoint INSTRUCTOR NOTES to guide participants through the course content and materials.  The *blue* Conversation Guide **(RC 1145)** is an introduction to ACP for individuals with chronic illness.  Remind participants that the videos are intended to demonstrate ACP facilitation skills and the power of the conversation.  Group debrief: Use the question which is included in the PowerPoint INSTRUCTOR NOTES. |
| **12:30 pm** | ***Lunch*** |
|  | **INSTRUCTOR TASKS:** Inform participants to reconvene in 30 minutes. |
| **1:00** | **Practice Exercise Role-Play 2 *(work in groups of three)*** |
|  | * First Steps ACP Conversation Guide: Adults with Chronic Illness * Exploring understanding of illness, experiences, and living well * Exploring goals for severe, permanent brain injury |
| **Group Debrief:** What skills did you learn? |
| **RC 1145 – First Steps ACP Conversation Guide: Adults with Chronic Illness**  **RC 1136 – First Steps ACP Role-Play #2 – Blue**  **RC 1134 – Instructor Guide: First Steps Standardized Role-Plays** |
| **INSTRUCTOR TASKS:** Review PowerPoint slide for this activity and INSTRUCTOR NOTES.  Review Instructor Guide: First Steps Standardized Role-Plays **(RC 1134)***.*  Assign participants to different role-play groups than Role-Play 1 that include three (3) participants per role-play group (e.g., count off or stay at table).  These role-play exercises help participants use and understand the standardized conversation guides.  Faculty/Instructors should describe their role as observer during the role-play exercises to provide real-time feedback and “teachable moments.” When team teaching, Faculty/Instructors should make a plan to observe specific groups (avoid crossing over between groups if possible).  Group debrief: Reconvene participants. All Faculty/Instructors participate and contribute 1–3 observations. Review the Instructor Guide: First Steps Standardized Role-Plays **(RC 1134)**that provides a summary of the role-play themes for debriefing.  Keep the focus on ACP facilitation skills. Listen and summarize themes for group learning (the PowerPoint slides include common themes). Consider writing themes on flip chart. |

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| **1:45** | **First Steps ACP Conversation Guide: The CPR Conversation** |
|  | * A person-centered approach to making treatment decisions: The Decision-Making Framework * Video: *First Steps ACP for Adults with Chronic Illness*: *The CPR Conversation (6 minutes)* * Review of CPR conversation: First Steps ACP Conversation Guide for Adults with Chronic Illness |
| **MC750 – CPR Fact Sheet (or CPR information distributed by your ACP program)**  **Video: *First Steps ACP for Adults with Chronic Illness: The CPR Conversation*** |
| **INSTRUCTOR TASKS:** Refer to the PowerPoint INSTRUCTOR NOTES to guide participants through the course content and materials.  The *blue* Conversation Guide includes the CPR discussion and the Decision-Making Framework to assist adults with chronic illness who may asked to make this treatment decision.  Use the Respecting Choices CPR Fact Sheet (or the CPR information distributed by your ACP program). The video demonstrates the ACP Facilitator skill of providing basic CPR information that prepares participants to explore the CPR decision and use a CPR Fact Sheet in the practice role-play exercises. |
| **2:15** | ***Break*** |
| **2:30** | **Practice Exercise Role-Play 3 *(work in pairs)*** |
|  | * CPR conversation: First Steps ACP Conversation Guide for Adults with Chronic Illness and CPR Fact Sheet |
| **Group debrief:** What questions are common? |
| * Facilitator Handbook to First Steps ACP Conversations (RC 1140) |
| **RC 1145 – First Steps ACP Conversation Guide: Adults with Chronic Illness**  **RC 1137 – First Steps ACP Role-Play #3 – CPR**  **MC750 – CPR Fact Sheet (or CPR information distributed by your ACP program)**  **RC 1140 – Facilitator Handbook to First Steps ACP Conversations** |
| **INSTRUCTOR TASKS:** Review PowerPoint slide for this activity and INSTRUCTOR NOTES.  Participants will choose a partner for role-play. Stay at table or nearby.  Group debrief: Focus on addressing questions that may arise during a CPR conversation.  Ask participants to pull out Facilitator Handbook to First Steps ACP Conversations **(RC 1140)** and turn to the page with the CPR Frequently Asked Questions.  Remind participants to practice providing basic CPR information using the RC CPR Fact Sheet or the CPR information used within their organization/community. |
| **3:00** | **Summary of the First Steps Conversation―Promise #5: Honoring Preferences and Decisions** |
|  | * The role of the Facilitator in transferring individual goals, values, and preferences to a written plan * Common problems with written plans * **Video: *Conversation with Individual and Agent: Summary (6:00)—****Translating Individual Preferences into a Written Plan* * Matthew’s advance directive sample statement * **Art’s final chapter** |
| **Video: *First Steps ACP Conversation with Individual and Agent: Chapter 3 – Summary***  **RC 1140 – Facilitator Handbook to First Steps ACP Conversations**   * **Appendix I: Optional Addendum to Advance Directive Documents** * **Appendix II: Program-Specific Information** |
| **INSTRUCTOR TASKS:** Refer to the INSTRUCTOR NOTES to guide participants through the course content and materials.  Ask participants to pull out Facilitator Handbook to First Steps ACP Conversations **(RC 1140)**. Explain role of Facilitator in helping the individual document the goals of care decisions to the written plan. Refer to *Appendix I: Optional Addendum to Advance Directive Documents* for sample language to document goals of care preferences on the advance directive document.  There will be a need to manage participant questions. Facilitators will need to know the existing policies/guidelines specific to their local community or organization for completion of legal advance directive documents; see *Appendix II: Program-Specific Information – Insert Information that Applies to Your ACP Program*. Encourage participants to take their questions back to their local organization/community and seek out education and written information that will help Facilitators assist individuals to create advance directive documents that meet the appropriate legal requirements. |
| **3:20** | **Summary: *7-Hour Course*** |
|  | * Creating a plan to improve your skills and achieve certification * Organizational plan for practice and support * Video: *The Value of Conversation* (optional video) * Distribute Making a Difference handout |
| **Video: *The Value of Conversation***  **RC 0033 – Making a Difference** |
| **INSTRUCTOR TASKS:** Make recommendations for continuing skill development:   * Set a goal to practice these new skills over the next months (may take up to 10 practice sessions to gain confidence and competence). It may be helpful to ask friends, family, or staff to role-play with you before you feel comfortable with patients/families. * Discuss plans for follow-up mentoring on ACP Facilitator Skills competency. * Discuss plan for continued communication with participants.   Show video.  Reference *Making a Difference* story **(RC 0033)**.  Thank participants. Inform participants to complete the course evaluation. |
| **3:30** | **Adjourn: *7-Hour Course*** |
|  | **INSTRUCTOR TASKS:** Customize PowerPoint RC 1100 by hiding the slides specific to the 8-hour agenda: Final Competency Role-Play (For 8-Hour Agenda) and Summary for 8-Hour Agenda.  Inform participants of the organizational plan to allow time for skill development through practice sessions before completing the final competency role-play validation to achieve FS ACP Facilitator certification. |

8-HOUR COURSE AGENDA  
Includes final competency role-play validation for certification

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| **3:20** | **Final Competency Role-Play** *(work in groups of four; 15 minutes/Facilitator)* |
|  | **RC 1145 – First Steps ACP Conversation Guide: Adults with Chronic Illness**  **MC520 – Information Card for Healthcare Agents (distributed by your ACP program)**  **MC750 – CPR Fact Sheet (distributed by your ACP program)**  **RC 1138 – First Steps ACP Role-Play #4 – Final**  **RC 1111 – First Steps ACP Facilitator Competency Documentation Tool** |
| **INSTRUCTOR TASKS:** Customize PowerPoint RC 1100 by hiding the slides specific to the 7-hour agenda: Summary for 7-Hour Agenda.  Review PowerPoint slide for this activity and INSTRUCTOR NOTES.  Distribute role-play packets **(RC 1138)** and provide instructions for this activity.  Decide how to assign participants to role-play groups that include four (4) participants per role-play group (e.g., count off or stay at table).  The observer for each role-play will complete a FS ACP Facilitator Competency Documentation Tool **(RC 1111)** for the Facilitator being observed. Have observers clearly print the full name of Facilitators on the competency documentation tool. At the completion of this exercise, collect all competency documentation tools as validation of completion of the course.  Time permitting, take a few minutes to *debrief* with the entire group. What did they learn from this final role-play exercise?  Submit completed FS ACP Facilitator Competency Documentation Tools to the Faculty/Instructor to document certification requirements. |
| **4:20** | Summary: *8-Hour Course* |
|  | * Creating a plan to improve your skills and maintain certification * Organizational plan for practice and support * Video: *The Value of Conversation* * *Making a Difference* handout |
| **Video: *The Value of Conversation***  **RC 0033 – Making a Difference**  **RC 1120 – Facilitator Certification certificates** |
| **INSTRUCTOR TASKS:** Make recommendations for continuing skill development:   * Set a goal to practice these new skills over the next months (may take up to 10 practice sessions to gain confidence and competence). It may be helpful to ask friends, family, or staff to role-play with you before you feel comfortable with patients/families. * Discuss plans for follow-up mentoring on ACP Facilitator Skills competency. * Discuss plan for continued communication with participants.   Show video.  Reference *Making a Difference* story **(RC 0033)**.  Thank participants. Inform participants to complete the course evaluation.  Distribute Facilitator Certification certificates **(RC 1120)** to those participants who have successfully completed the Respecting Choices certification requirements. |
| **4:30** | Adjourn: *8-Hour Course* |
|  | **RC 1216 – Following a First Steps ACP Facilitator Certification Course: 5 Steps** |
| **INSTRUCTOR TASKS:** Review the 5 Steps Following a FS ACP Facilitator Certification Course **(RC 1216)**. |