ACP FACILITATOR COMPETENCY DOCUMENTATION TOOL

*To document First Steps (FS) ACP Facilitator Certification; to document renewal of FS ACP Facilitator Certification; and to monitor fidelity*

Facilitator Name: Date:

Instructor/Observer:

Conversation Guide Used: **⬜** FS ACP Conversation Guide (RC 1143)

**⬜** FS ACP Conversation Guide: Adults with Chronic Illness (RC 1145)

Directions:Use the appropriate FS Conversation Guide as you are recording your observations. Use “M.O.” for missed opportunity. Use “N/A” when questions are not applicable. Provide specific examples to increase learning.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Did the Facilitator: | Met | M.O. | N/A | Examples |
| Explore fears or concerns about advance care planning (ACP) |  |  |  |  |
| Clarify ACP and/or AD   * Provide information * Use Teach Back to assess understanding |  |  |  |  |
| Help individual choose a healthcare agent (IF agent is not selected)   * Review the four qualities of a healthcare agent * Provide information on the role of the healthcare agent |  |  |  |  |
| Explore understanding of healthcare agent role (IF agent is present)   * Review the four qualities of a healthcare agent * Explore questions |  |  |  |  |
| Explore understanding of medical condition   * Provide information if able * Explore questions for physician |  |  |  |  |
| Explore experiences   * What was learned * Ask agent, if present, if anything else was learned |  |  |  |  |
| Explore living well |  |  |  |  |
| Explore cultural and/or spiritual beliefs |  |  |  |  |
| Explore goals of care scenario   * Describes scenario as written * Uses teach back to explore understanding * Explores questions * Ask agent, if present, for questions |  |  |  |  |
| Use education/decision aids (e.g., CPR)   * Provide information in unbiased manner * Use Teach Back to assess understanding |  |  |  |  |
| Assist with completing a written AD   * Explore readiness to complete |  |  |  |  |
| Summarize and create a follow-up plan   * When agent is present * When agent is not present |  |  |  |  |

Communication Skills: Mark when each skill is observed. Record 2-3 examples.  
Must demonstrate four of the following

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Did the Facilitator: | Met | M.O. | N/A | Notes/Examples |
| Explore meanings of words/phrases |  |  |  |  |
| Paraphrase/clarify |  |  |  |  |
| Ask, “Anything else?” |  |  |  |  |
| Listen for and summarize themes |  |  |  |  |
| Affirm/reaffirm purpose of conversation |  |  |  |  |
| Verbalize empathy |  |  |  |  |
| Use Ask-Teach-Ask technique |  |  |  |  |
| Remain value-neutral |  |  |  |  |
| Pay attention to non-verbal communication |  |  |  |  |

Did the Facilitator use the conversation guide? ⬜ Yes ⬜ No ⬜ Most of Time

Did the Facilitator ask all questions as written? ⬜ Yes ⬜ No ⬜ Most of Time

Did the Facilitator use critical-thinking skills to respond to questions? ⬜ Yes ⬜ No

Give 1-2 examples:

FOR INSTRUCTORS as appropriate: Is certification awarded/renewed? ⬜ Yes ⬜ No

If no, list the follow-up plan for improvement: