



Starting the Conversation: Working Advance Care Planning into Everyday Care

Facilitator Guide

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Intended Audience

This workshop is intended for health care providers - physicians, nurses, social workers, spiritual care practitioners, renal unit staff and others - who are aware of the basic tenets of Advance Care Planning, and have bedside/office /home interactions with patients with chronic illnesses.

ACP has already been identified as an important component of quality health care discussions, shared decision making, and imparting hope into quality health care delivery. This workshop is intended to assist health care providers in embedding ACP into the routine care they provide patients and raise awareness of the importance of introducing the topic of ACP.

Purpose Of the Workshop

The purpose is to provide health care providers with

1. practical skills in **raising the topic** of Advance Care Planning (ACP), and
2. methods of overcoming barriers to introducing ACP conversations.

Learning Objectives

Upon completing the training, participants will be able to

1. **articulate the benefits of having “values” conversations with family and health care providers,**
2. **explore ways to overcome typical barriers to initiating ACP conversations,**
3. **explore ways in which to incorporate ACP conversations into everyday clinical practice and normalize ACP conversations,**
4. **practice scenarios for appropriate wording and responses during ACP conversations, and**
5. **identify when and to whom to make referrals for ACP facilitation.**

Authors' Caution: Our experience of conducting this time-constrained workshop has included times where the group can easily diverge into sideline conversations and debriefs about moral dilemmas. **We recommend having a plan (such as debrief time following the workshop) for those times when emotional exchanges occur, or strong views prevail** which may derail the workshop. Following this script closely will help prevent those situations.

This guide includes suggested times for a 2 hour interactive presentation.

Getting Started

Prepare a flip chart poster with the definition of Advance Care Planning, and post it at the front of the room.

1. Ensure that the room is set up appropriately and that you have you have all your supplies. (See Workshop Overview.)
2. As students enter the classroom, have them sign in, and pick up educational materials (My Voice Workbook®, Information Booklet, CPR brochures, question sheets for the workshop, workshop evaluation form, etc.)
3. Have each participant introduce themselves to the larger group.
4. Provide an overview of the workshop. This should include the definition of **Advance Care Planning**. ***Advance Care Planning is a process by which people can think about their values regarding future health care choices, hear medical information that is relevant to their health concerns, communicate wishes and values to their loved ones or agents, and document their choices so the decisions are available to health care providers wherever that person receives care.***
5. Explain how the question sheets will be used throughout the session (i.e., written answers, discussion prompts).
6. Explain that they will move into breakout groups periodically during the session to discuss questions on their worksheets.
7. Explain that you will use the timer to keep the session on track and that you are committed to completing the session on time.

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Making ACP easier, more effective, and ultimately more beneficial to our patients

Section	Key Learnings & Discussion Guide
1	<p>AN INTRODUCTION TO ADVANCE CARE PLANNING</p> <p>Group Setup</p> <ul style="list-style-type: none"> ▪ Set tables up in U-shape or half rounds. Participants will form small groups during some segments of the workshop. ▪ Hand out worksheets to each participant. ▪ Use flip chart or a piece of paper to record answers <p>Video & Discussion</p> <p>Discuss definition of ACP (have this written on a flip chart):</p> <p>A process by which people can:</p> <ul style="list-style-type: none"> • Think about their goals and values regarding future health care choices • Hear medical information that is relevant to their health concerns • Communicate goals and values to their loved ones/substitute decision-makers • Document their choices so the decisions are available to health care providers wherever that person receives care. <p>Play portion of the DVD: <i>An Introduction to Advance Care Planning.</i> 7 minutes</p> <p>In the large group discuss the following questions: 8 minutes</p> <ul style="list-style-type: none"> ▪ What barriers have you experienced in bringing up the topic of ACP? ▪ What are the benefits of ACP conversations? <p>Record comments on flip chart during discussion. Summarize these comments, along</p>

Section	Key Learnings & Discussion Guide
	<p>with the key points below, as you close this segment.</p> <p>Key Points (summarize for group)</p> <ol style="list-style-type: none"> 1. Health care providers can find initiating ACP conversations uncomfortable for a number of reasons. 2. ACP is more than just discussing end of life wishes—it’s about exploring values, beliefs, and goals for living well. 3. It is important to integrate ACP into everyday patient care if we are to be successful in normalizing it. <p style="text-align: right;"><i>Total time for Section 1:</i> 15 minutes</p>

Section	Key Learnings & Discussion Guide
2	<p data-bbox="269 373 1096 409">LEARNING FROM EXPERIENCED ACP FACILITATORS</p> <p data-bbox="269 457 571 493"><i>Video & Discussion</i></p> <p data-bbox="269 531 1495 638">Introduce this segment as an opportunity to hear from other ACP facilitators about their impressions and experiences. Pay particular attention to their ways of identifying how they know if someone is ready, or what is a good ACP conversation.</p> <p data-bbox="269 711 1495 783">Play portion of the DVD entitled: <i>Learning from Experienced ACP Facilitators.</i> 9 minutes</p> <p data-bbox="305 894 1495 930">In large group discuss the following questions: 10 minutes</p> <ul data-bbox="321 968 1377 1115" style="list-style-type: none"> ▪ What cues would help you recognize a patient's readiness for an ACP conversation? ▪ What are the components of a good ACP conversation? ▪ Who should introduce ACP? Who should facilitate ACP conversations? <p data-bbox="269 1226 1466 1297">Record comments on flip chart during discussion. Summarize these comments along with the key points below, as you close this segment.</p>

Section	Key Learnings & Discussion Guide
	<p data-bbox="272 457 440 491">Key Points</p> <ol data-bbox="318 541 1490 940" style="list-style-type: none"><li data-bbox="318 541 1490 718">1. A successful ACP conversation includes a willingness on the part of the health care provider to:<ul data-bbox="412 613 815 718" style="list-style-type: none"><li data-bbox="412 613 805 646">✚ initiate the conversation,<li data-bbox="412 646 815 680">✚ be open and honest, and<li data-bbox="412 680 737 718">✚ listen to the patient.<li data-bbox="318 726 1409 793">2. Recognizing and responding to patient cues for ACP can be done in a few minutes.<li data-bbox="318 835 1490 940">3. All members of the health care team share responsibility for promoting Advance Care Planning—weather it be introduction of the topic, sharing ACP information, or facilitating in-depth ACP conversations. <p data-bbox="906 1419 1497 1453" style="text-align: right;"><i>Total time for Section 2: 20 minutes</i></p>

Section	Key Learnings & Discussion Guide
3	<p data-bbox="267 451 1209 541">DIALOGUES: SIMULATED CLINICIAN-PATIENT CONVERSATIONS</p> <p data-bbox="267 590 620 630"><i>Video & Discussion</i></p> <p data-bbox="267 743 1463 888">Introduce this segment as an opportunity to look at the ways in which ACP scenarios can unfold. Pay particular attention to what you liked, as well as what you would do differently. Consider what you would actually say, instead what of simply critiquing the scenario.</p> <p data-bbox="267 1001 1442 1108">Play scenario #4, and one other scenario of your choice, under the section entitled: <i>Dialogues</i>. Each dialogue is approximately 2 ½ minutes, so if you have more time, this segment is a good place to use it.</p> <ol data-bbox="316 1146 1474 1436" style="list-style-type: none"> 1. Bob Gray: Conversation in a hospital room between a nurse and Mr. Gray. Highlights some important conversation strategies. 2. Connie Cheung: Conversation in a hospital room between a nurse and Mrs. Cheung. 3. George Sterling: Conversation in a waiting room between a social worker and Mr. Sterling. This person doesn't want to talk about ACP. 4. Harjinder Grewal: Conversation in the patient's home between a Care Coordinator and Mrs. Grewal. <p data-bbox="1295 1476 1466 1507" style="text-align: right;">10 minutes</p> <p data-bbox="267 1549 1429 1656">Breakout groups (2 or more depending on how many in the workshop) discuss the following questions after viewing each scenario. Write down your responses, as these will be shared with the larger group.</p> <p data-bbox="1328 1661 1498 1692" style="text-align: right;">10 minutes</p> <ul data-bbox="316 1696 1369 1837" style="list-style-type: none"> ▪ What worked in this ACP conversation? ▪ What would you do or say differently? Write down your actual words. ▪ Why might patients and/or family members not want to engage in ACP conversations?

Section	Key Learnings & Discussion Guide	
	<p>Call breakout groups together to share their responses. Use a flip chart to record key comments.</p> <p>Key Points</p> <ol style="list-style-type: none"> 1. The topic of Advance Care Planning can be brought up in a variety of clinical settings by a variety of disciplines, and in a variety of ways. 2. ACP is as much about sharing what is important to a person, as health care planning. What is important to someone informs their health care decisions. 3. Listening to the patient's point of view and encouraging them to express their feelings are essential components of an Advance Care Planning conversation. 	<p>15minutes</p> <p>Total time for Section 3: 35 minutes</p>

Section	Key Learnings & Discussion Guide
4	<p>MONOLOGUES: HAVE YOU HEARD ABOUT ADVANCE CARE PLANNING?</p> <p><i>Video & Discussion</i></p> <p>Introduce this segment as an opportunity to make your own responses to the typical things that patients say when you introduce ACP.</p> <p>Tell the group that after viewing the patient’s response, participants will be asked to write down how they would answer the patient. After participants have individually listened and responded to the patient response, have them share their answers in the breakout groups, and co-determine a best response to bring to the large group.</p> <p>Choose 5-6 of the 15 responses from the section entitled: <i>Monologues</i>, where patients answer the question: <i>Have you heard about Advance Care Planning?</i></p> <ol style="list-style-type: none"> 1. Advance Care Planning? No, what’s that? 2. Yes—but my doctor knows what to do. 3. I thought that was just for people who were dying. 4. I already have a will, and my daughter is my power of attorney. 5. Yeah, I have, but is it legal? 6. Yes I have. I know I need to talk to my kids about this but it’s not easy. 7. Yup. And I don’t wanna talk about it. 8. My family will know what I want 9. I heard it doesn’t mean anything once you’re in the hospital. 10. Yes, I’ve heard about it, but when I think about someone speaking for me—I don’t think my husband could do that. 11. I heard it’s just another way for the health system to save money. 12. Well, my friend had one of those and when she got really sick, no one listened. 13. Somebody gave me a booklet about it and...I don’t know—I put it somewhere, but I haven’t really gotten around to it. 14. Yes, but when I try to talk to my kids about it, they keep changing the subject. 15. I heard Doctor can over-ride my wishes.

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	<p>After viewing the patient's response, have participants write down how they would answer the patient. After participants have individually listened and responded to the patient response, have them share their answers in the breakout groups, and determine a best response to bring to the large group.</p> <p>5 minutes x 6 scenarios</p> <p>Call breakout groups together to share their responses. 40 minutes Use a flip chart to record key comments.</p> <p>Key Points</p> <ol style="list-style-type: none"> 1. Patients will have a variety of responses to the question, "Have you heard about Advance Care Planning?" 2. It is important for the clinician to be comfortable with various responses to the question about ACP, and answer in a knowledgeable, honest, and non-judgmental fashion. 3. Who in your facility is trained to facilitate ACP conversations, if you are not able to do so? You will need to know this for referral purposes. <p style="text-align: right;">Total time for Section 4: 40minutes</p>

Section	Key Learnings & Discussion Guide
5	<p>SUMMARY</p> <p>Review the information on the flip charts and stress that facilitating ACP conversations is a team responsibility. Team members can learn strategies for both introducing the topic of ACP, and arranging for follow-up. Each member of the healthcare team has a role to play—from simply offering a brochure, to engaging the patient and family in a comprehensive conversation.</p> <p>It is important for all members of the team to record ACP conversation outcomes on the Advance Care Planning Record (or equivalent), whether the patient only took a brochure home or engaged in an in depth conversation.</p> <p>Health care providers can find initiating Advance Care Planning conversations uncomfortable for a number of reasons. These reasons may include time constraints, personal discomfort with end of life issues, difficulty starting or finishing the conversation, or a reluctance to discuss personal values and beliefs with patients. Since health care providers have a moral and ethical obligation to initiate these conversations with patients, it is important to identify and overcome barriers—and bring up the topic.</p> <p>The first and most important step is introducing the topic—working Advance Care Planning into everyday patient care.</p> <p>The goal of today’s session has been to give you new language and skills for introducing the topic of ACP. Thank you for participating.</p> <p>Please complete the personal and team goals form.</p> <p style="text-align: right;">Total time for Section 5: 10 minutes</p>
	<p style="text-align: right;">Total time for entire workshop: 120 minutes</p>

Resources

Resources for both healthcare providers and members of the public are available on the Fraser Health website. <http://www.fraserhealth.ca/Services/HomeandCommunityCare/AdvanceCarePlanning/Pages/default.aspx>

Fraser Health resources:

- “My Voice©” workbook in English & Punjabi
- Advance Care Planning Record
- ACP Wallet Card
- ACP Information booklet
- “Making Decisions About CPR” brochure
- ACP Referral Card
- Posters in 7 languages
- Educational DVDs in English, Punjabi & Chinese
- E-book “Planning in Advance for Your Future Healthcare Choices”
- Toll free: 877-825-5034
- On-line ACP education module
- Greensleeves for patient medical files
- Green document holder for home use