



# **FIRST STEPS<sup>®</sup>** **ADVANCE CARE PLANNING (ACP)**

**March 6–8, 2018**  
**La Crosse, Wisconsin**

- **First Steps<sup>®</sup> ACP Design and Implementation**
- **First Steps<sup>®</sup> ACP Facilitator Certification**
- **First Steps<sup>®</sup> ACP Instructor Certification**

**Respecting Choices<sup>®</sup>**

PERSON-CENTERED CARE

***A System for Person-Centered  
Decision Making that Transforms Healthcare***



First Steps<sup>®</sup> Advance Care Planning (ACP) is the foundation for weaving ACP discussions into person-centered care and preventive healthcare for all adults. When integrated in the outpatient or community setting, and early in the course of healthcare, First Steps ACP discussions help to normalize the concept of planning, and orient individuals to the importance of regular review and update of written plans.

## **Course Content**

First Steps<sup>®</sup> ACP Design and Implementation

First Steps<sup>®</sup> ACP Facilitator Certification

First Steps<sup>®</sup> ACP Instructor Certification

Organizations interested in replicating the First Steps ACP model will find it valuable to send representatives to all three days; however, participants are welcome to attend First Steps ACP Facilitator Certification or Design and Implementation independently, based on their objectives.

## **First Steps ACP Design and Implementation**

First Steps ACP Design and Implementation is intended for healthcare and community leaders (administrators, managers, program directors, and others) and intermediate to advanced level social work practitioners who are interested in implementing an effective ACP program within their organization or community.

### **Purpose**

The purpose of this program is to describe the key elements in designing an effective ACP program within an organization or community.

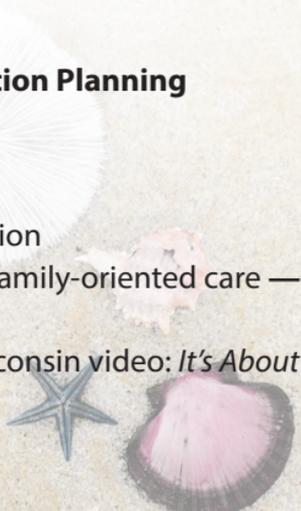
### **Learning Outcomes**

At the end of this course, the participant will be able to:

1. Describe the Respecting Choices evidence-based, systematic approach to creating a sustainable ACP program.
2. Identify five leadership strategies that guide the cultural transformation of person-centered ACP.
3. Explain four key elements and related strategies in designing a First Steps ACP implementation plan.
4. Participate in small group problem-solving activities.

# AGENDA

- 7:30 a.m. Continental Breakfast**
- 8:00 Welcome and Introductions**
- Respecting Choices faculty and staff
  - Participants
  - Overview of objectives and materials
- 8:45 Respecting Choices ACP Program Overview**
- The heart of Respecting Choices
    - NBC’s Rock Center video: *The Conversation*
  - Definition of ACP and the Staged Approach to Planning
  - Key elements in sustaining an effective ACP system
  - Respecting Choices: The evidence and return on investment
- 9:45 Break**
- 10:00 Transforming the Healthcare Culture: Leadership Matters**
- Creating conditions for change
  - Characteristics of leaders in the midst of cultural change
- 10:30 Small group activity**
- 11:00 Debrief**
- 11:15 Key Elements in Sustaining an Effective ACP System: A Closer Look**
- Key Element #1: System Redesign
    - AMA EPEC video: *The Role of the Provider*
- 12:00 p.m. Lunch**
- 12:45 Key Elements in Sustaining an Effective ACP System: A Closer Look (continued)**
- Key Element #2: ACP Education and Facilitator Certification
  - Key Element #3: Community Engagement
    - Frasier Health video: *Personal Stories*
  - Key Element #4: Continuous Quality Improvement
    - The 5 Promises
- 2:30 Break**
- 2:45 Small Group Implementation Planning**
- 3:45 Debrief**
- 4:15 Summary and Evaluation**
- It’s About the Conversation
    - Person-centered and family-oriented care —  
**The “WHY”**
    - Honoring Choices Wisconsin video: *It’s About the Conversation*
- 4:30 Adjourn**



# First Steps ACP Facilitator Certification

First Steps ACP Facilitator Certification is intended for healthcare providers (nurses, all levels of social workers, health educators, and physicians), clergy, and others involved in providing ACP facilitation.

## Purpose

The purpose of this program is to assist participants in learning effective communication and interview skills for person-centered ACP facilitation.

## Prerequisite

First Steps ACP Facilitator Online Core Curriculum (included in registration fee)

## Learning Outcomes

At the end of this course, the participant will be able to:

1. Identify interview skills for facilitating First Steps ACP conversations with healthy adults.
2. Identify interview skills for facilitating First Steps ACP for adults with chronic illness.
3. Create strategies to communicate the plan, including the completion of an advance directive document.
4. Examine the ACP Facilitator's role in implementing three key systems for ACP effectiveness.
5. Demonstrate beginning competency in facilitating First Steps ACP conversations through role-play activities.

## Precourse Preparation

1. Review the Advance Directive (AD)/Power of Attorney for Healthcare forms and AD guidelines used in your state.
2. Complete "practice" **Advance Directive document** (submit to Instructor on day of course for review; document will be returned to participant).
3. Attempt **personal discussion exercise**.

## AGENDA

**7:30 a.m. Continental Breakfast**

**8:00 Introductions and Welcome**

- Welcome
- Introduction of faculty and participants

**Overview of Course**

- Program description, objectives, and agenda
- Competency evaluation expectations

- 8:30**                    **Review of First Steps ACP Facilitation Skills**
- General interview skills
  - First Steps ACP Interview Tool (meeting with individual, agent not selected)
    - Video role-play: *First Steps ACP Introduction*
    - Group evaluation of observed skills
  - First Steps ACP Interview Tool (meeting with individual and agent)
- 9:30**                    **Break**
- 9:45**                    **Practice Role-Play Activity** (*work in groups of three*)
- First Steps ACP Interview Tool (meeting with individual, agent not selected)
  - First Steps ACP Interview Tool (meeting with individual and agent)
    - Debrief: What skills did you learn?
- 10:30**                    **Review of ACP Facilitation Skills**
- First Steps ACP Interview Tool: Adults with Chronic Illness (meeting with individual, agent not selected)
  - First Steps ACP Interview Tool: Adults with Chronic Illness (meeting with individual and agent)
    - Video role-play: *First Steps ACP for Adults with Chronic Illness*
    - Focus on exploring understanding of illness, experiences, and living well
    - Debrief: What skills did you observe?
  - Help make informed treatment decisions: The Decision-Making Framework
    - Video role-play: *First Steps ACP for Adults with Chronic Illness: The CPR Conversation*
    - Debrief: What skills did you observe?
- 11:30**                    **Practice Role-Play Exercises** (*work in groups of three*)
- First Steps ACP Interview Tool: Adults with Chronic Illness (meeting with individual and agent)
    - Focus on exploring understanding of illness, experiences, and living well
  - First Steps ACP Interview Tool: Adults with Chronic Illness (meeting with individual and agent)
    - Focus on goals for sudden illness or injury and CPR decision
- 12:15 pm**                **Debrief: What skills did you learn?**
- 12:30**                    **Lunch**



- 1:15            The Personal Engagement Activity**
- What did you learn when attempting to have an ACP conversation with a loved one?
  - Why is this a valuable activity?
  - What are the common themes?
- 1:30            Create Strategies to Communicate the Plan**
- Creating an advance directive
  - Review of the legal issues and requirements for completing a written advance directive in your organization/community; discuss common issues and concerns
  - Interview Tool: Summary of ACP conversation and follow-up
  - Create individualized strategies for follow-up
- 2:15            Break**
- 2:30            Making ACP Work: What the Facilitator Needs to Know**
- Strategies to promote ACP
  - Define the ACP Team and responsibilities
  - Document storage and retrieval expectations
- 3:00            Final Competency Role-Plays** (*work in groups of four, 15 minutes/Facilitator*)
- First Steps ACP Interview Tools
  - Competency Checklists (completed by observer)
- 4:00            Summary/Evaluation**
- What did you learn today?
  - What do you need to improve your skills?
  - Next steps
  - Video, an agent's testimonial: *In Pam's Own Words: The Value of ACP for Healthcare Agents*
- 4:30            Adjourn**

**For those intending to become certified as a First Steps Instructor and who have completed a First Steps ACP Facilitator Certification course prior to September 2015, it is recommended that you attend the First Steps ACP Facilitator Certification course as an auditor and active participant for the following reasons:**

- **To refresh your facilitation skills in preparation for Instructor Certification role-play competency;**
- **To receive all updated course materials, interview tools, and Online Core Curriculum; and**
- **To observe Respecting Choices Faculty teaching strategies in preparation for Instructor Certification group discussion.**

**The auditor fee is \$200.**

## First Steps ACP Instructor Certification

First Steps ACP Instructor Certification is intended for healthcare educators, community leaders, intermediate to advanced level social work practitioners, and chaplains who are interested in becoming certified to replicate the First Steps ACP Facilitator Certification course in their own organization or community.

### Purpose

The purpose of this program is to assist participants in becoming certified as Respecting Choices First Steps ACP Instructors.

### Prerequisite

Participants must attend the First Steps ACP Design and Implementation course and be certified as First Steps ACP Facilitators (if certified prior to September 2015, consider auditing the First Steps ACP Facilitator Certification course as described previously).

### Registration Requirements

To attend First Steps ACP Instructor Certification, the healthcare or community organization(s) the Instructor candidate represents (or Instructors themselves if attending independently) must commit through a written agreement to replicate the standardized Respecting Choices First Steps ACP curriculum. Please contact Britt Welnetz at [bwelnetz@respectingchoices.org](mailto:bwelnetz@respectingchoices.org) for more information.

### Learning Outcomes

At the end of this course, the participant will be able to:

1. Define Instructor responsibilities and common strategies for teaching the Respecting Choices First Steps ACP Facilitator Certification course.
2. Facilitate a brief discussion on a selected ACP topic.
3. Demonstrate ACP facilitation skills and role of the Instructor through a selected role-play.
4. Complete a First Steps ACP Instructor Certification Exam.



## AGENDA

- 7:30 a.m. Continental Breakfast**
- 8:00 Instructor Responsibilities and Strategies for Teaching the First Steps ACP Facilitator Certification Course**
- Instructor certification expectations and copyright restrictions
  - Role of the Instructor
  - Preparing to teach your own First Steps ACP Facilitator course
    - Course preparation checklist, including strategies for customization and the role of the online Instructor
    - Instructor’s guide to agenda
  - Teaching and presentation strategies
  - Learning Management System (LMS) features
- 10:15 Break**
- 10:30 Instructor-Led Discussions**
- Each Instructor candidate will facilitate a 10-minute discussion with other participants who will role-play typical questions that arise during the First Steps ACP Facilitator Certification course
- 11:45 Certification Exam**
- 12:15 p.m. Lunch**
- 12:45 Role-Play Demonstration with Faculty; Group Observation and Feedback**
- Role-play one of the following First Steps ACP discussions:
- First meeting with individual, agent not selected
  - Second meeting with individual and agent
  - Adults with Chronic Illness, meeting with individual, agent not selected
  - Adults with Chronic Illness, meeting with individual and agent
- 4:00 Adjourn**

### Certification Disclaimer

Respecting Choices issues a certificate upon fulfillment of the following elements:

1. Completion of a specified Respecting Choices educational program with standardized content and processes;
2. Successful demonstration of skills associated with the specified program; and
3. If applicable, an 80 percent or higher score on a written examination associated with the specified program.

The Respecting Choices certification programs are not credentialed by a national accreditation body.

## Continuing Education (CE)

Gundersen Lutheran Medical Center is the provider of nursing contact hours in a joint provider partnership with C-TAC Innovations.

### Nursing Contact Hours

Gundersen Lutheran Medical Center, Inc., is an approved provider of continuing education by the Wisconsin Nurses Association, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation.

First Steps ACP Design and Implementation provides **7.0** contact hours. First Steps ACP Facilitator Certification provides **7.0** contact hours. The required online Facilitator course modules provide a total of **6.25** contact hours.

#### California

The provider (Gundersen Lutheran Bereavement and Advance Care Planning Services) is approved by the California Board of Registered Nursing, provider #12245, for **7.0** contact hours for First Steps ACP Design and Implementation, **7.0** contact hours for First Steps ACP Facilitator Certification, **7.0** contact hours for First Steps ACP Instructor Certification, and a total of **6.25** contact hours for the prerequisite four online modules.

### Social Work Credits

Gundersen Lutheran Medical Center, Inc., provider #1089, is approved as a provider for continuing education by the Association of Social Work Boards (ASWB), [www.aswb.org](http://www.aswb.org). ASWB current approval period can be found at [www.respectingchoices.org/types-of-curriculum-and-certification/continuing-education/](http://www.respectingchoices.org/types-of-curriculum-and-certification/continuing-education/).

Gundersen Lutheran Medical Center, Inc., maintains responsibility for the program. Social workers should contact their regulatory board to determine course approval.

Social workers will receive **7.0** continuing education hours for First Steps ACP Design and Implementation, **7.0** continuing education hours for First Steps ACP Facilitator Certification, and a total of **6.25** continuing education hours for the prerequisite four online modules.

**To receive CE credit, nurses and social workers must complete the online modules (if applicable), sign in at the beginning and end of the day, and be present for the entire day of each onsite workshop for which they register. No partial credit will be given. Completed evaluation is required for contact or continuing education hours. CE certificates will be sent by email or as requested by mail following online submission of course evaluation within 30 days of course attended.**

**Note: After completing the prerequisite online modules, you will receive CE certificates for a total of 6.25 contact or continuing education hours. The Respecting Choices office can verify your completion of the online modules. You do not need to bring your certificate to the onsite course.**

## Continuing Medical Education (CME)

CME credit is available for the required online Facilitator course modules only, providing a total of **6.25** CME credits. An additional \$200 fee is applied at time of registration. Please see [www.respectingchoices.org/types-of-curriculum-and-certification/continuing-education/](http://www.respectingchoices.org/types-of-curriculum-and-certification/continuing-education/) for more information.

## Planning Committee and Speakers

Bernard J. Hammes, PhD; Linda Briggs, MSN, MA, RN; Pat Tadel, MSN, RN; Stephanie Anderson, DNP, RN; Kathleen Ziemba, MSW, LCSW; and Paul Larson, MS, RN. Speakers and planners have an employment relationship with Respecting Choices or Gundersen Health System. We are a provider of the program, but we do not endorse any commercial products in conjunction with the program. Off-label use of any products will not be discussed.

Day 1 First Steps Design and Implementation speakers include Bernard Hammes, PhD; Linda Briggs, MSN, MA, RN; Stephanie Anderson, DNP, RN; and Sandy Schellinger, MSN, RN, NP-C.

Day 2 First Steps Facilitator Certification speakers include Sandy Schellinger, MSN, RN, NP-C; Pat Tadel, MSN, RN; and Kathleen Ziemba, MSW, LCSW.

Day 3 First Steps Instructor Certification speakers include Sandy Schellinger, MSN, RN, NP-C; Pat Tadel, MSN, RN; and Kathleen Ziemba, MSW, LCSW.

Updated information regarding speakers for each day will be provided in this course brochure and on the Respecting Choices website at [www.respectingchoices.org/event/spring-2018-national-first-steps-acp-conference/](http://www.respectingchoices.org/event/spring-2018-national-first-steps-acp-conference/).

Additional information on speakers is available at [www.respectingchoices.org/about-us/respecting-choices-faculty/](http://www.respectingchoices.org/about-us/respecting-choices-faculty/) or by emailing [info@respectingchoices.org](mailto:info@respectingchoices.org).

## Accommodations

In accordance with the Americans with Disabilities Act, Respecting Choices seeks to make this conference accessible to all. If you require special assistance/accommodations, please contact Britt Welnetz at (608) 473-1025 or [bwelnetz@respectingchoices.org](mailto:bwelnetz@respectingchoices.org).



## Course Location

The Cargill Room, 328 Front Street South, La Crosse, WI 54601

## Lodging

Refer to your event confirmation email and the Respecting Choices website under **National Conferences and Events** for suggested hotel accommodations.

## Date/Time

**Tuesday, March 6** 8 a.m. – 4:30 p.m.

**Wednesday, March 7** 8 a.m. – 4:30 p.m.

**Thursday, March 8** 8 a.m. – 4:00 p.m.

(Sign-in and continental breakfast begins at 7:30 a.m. each day.)

## Registration Fees

<b>First Steps ACP Design and Implementation</b>	<b>\$350</b>
<b>First Steps ACP Facilitator Certification</b>	<b>\$420</b>
<b>First Steps ACP Facilitator Audit</b> (for previously certified First Steps ACP Facilitators)	<b>\$200</b>
<b>First Steps ACP Instructor Certification</b>	<b>\$475</b>
<b>CME Fee (for online modules only)</b>	<b>Add \$200</b>

Fees include classroom instruction, course materials, continuing education credit, continental breakfast, lunch, and refreshments.

The First Steps ACP Facilitator Certification and Audit fees include the Online Core Curriculum.

Payment can be made by Visa, MasterCard, American Express, or Discover.

**Register at: [respectingchoices.org](http://respectingchoices.org)**

## Cancellation Policy

We offer a full refund minus a \$50 administrative fee for cancellations made more than 30 days prior to the course date. Seating is limited so registrations canceled within 30 days of the course date will not be refunded. If online modules have been started, the cost of the modules (\$110 non CME, \$310 CME) will also be deducted from your refund.

## Transfer Policy

Registrations cannot be transferred to another person. Registrations must be canceled according to the cancellation policy and a new registration submitted.

Individuals from countries other than the United States cannot be certified as Respecting Choices Instructors unless it is part of a license agreement with an organization. If you are interested in becoming certified as an Instructor, please contact Respecting Choices at [info@respectingchoices.org](mailto:info@respectingchoices.org).

## Grievances/Comments/Concerns

If you have any questions or concerns about this program, please contact Britt Welnetz at (608) 473-1025 or [bwelnetz@respectingchoices.org](mailto:bwelnetz@respectingchoices.org).

**Respecting Choices®**

PERSON-CENTERED CARE

***A System for Person-Centered  
Decision Making that Transforms Healthcare***

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**Learn from the experts  
in advance care planning**

**Respecting Choices®**  
PERSON-CENTERED CARE

[respectingchoices.org](http://respectingchoices.org)

**Space is limited.  
Register today!**

**What others are saying about this course**

**“Amazing...**

**These 3 days are exquisitely designed. I do a lot of teaching and the content, pace and competence of faculty are superb.”**

**“Great programs.**

**Loved the dynamics and role-playing.”**

**“Thank you for allowing  
conversations.**

**Well balanced videos, presentations, practice sessions.”**

**“Excellent, rich program.**

**Applicable to real life situations.”**

**“Very good program.**

**really makes me hopeful that we can have the conversation. It was an excellent day. I'm excited about the possibilities for implementing change in practice.”**