FIRST STEPS®
ADVANCE CARE PLANNING (ACP)

September 11–13, 2018
La Crosse, Wisconsin

- First Steps® ACP Design and Implementation
- First Steps® ACP Facilitator Certification
- First Steps® ACP Instructor Certification

Respecting Choices®
PERSON-CENTERED CARE

A System for Person-Centered Decision Making that Transforms Healthcare
First Steps® 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® ACP Design and Implementation
First Steps® ACP Facilitator Certification
First Steps® 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 At-A-Glance

7:30 a.m. Sign In and Continental Breakfast
8:00 Welcome and Introductions
8:45 Respecting Choices ACP Program Overview
9:45 Break
10:00 Transforming the Healthcare Culture: Leadership Matters
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
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
   • Key Element #4: Continuous Quality Improvement
2:30 Break
2:45 Small Group Implementation
3:45 Planning Debrief
4:15 Summary
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 conversation skills for person-centered ACP facilitation.

Pre-Course Requirements
1. First Steps ACP Facilitator Online Core Curriculum, modules 1–4 (included in registration fee)
2. Personal Engagement Activity
3. Review of Advance Directive document appropriate for your organization/community

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

1. Identify communication skills for facilitating First Steps ACP conversations.
2. Create strategies to transfer individual goals, values, and preferences to the written plan.
3. Demonstrate beginning competency in facilitating First Steps ACP conversations through role-play activities.
4. Become certified as a First Steps ACP Facilitator through final competency role-play demonstration.

Agenda At-A-Glance

7:30 a.m. Sign In and Continental Breakfast
8:00 Welcome and Overview
8:30 The Personal Engagement Activity
8:45 First Steps ACP Conversation Guide (for adults who have not started, or engaged in, a planning process)—Facilitation Skills
   • Communication skills and techniques

First Steps ACP Conversation Guide (healthcare agent not present)
   • First Steps ACP Introduction Guide
9:15  Break

9:30  First Steps ACP Conversation Guide (healthcare agent present)

10:30  Practice Exercise Role-Play 1  
(work in groups of three)

11:15  Group Debrief: What skills did you learn?

11:20  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

12:00 p.m.  Lunch

12:45  Practice Exercise Role-Play 2  
(work in groups of three)

1:25  Group Debrief: What skills did you learn?

1:30  First Steps ACP Conversation Guide: The CPR Conversation

2:00  Break

2:15  Practice Exercise Role-Play 3  
(work in pairs)

2:30  Summary of the First Steps Conversation: Promise #5 Honoring Preferences and Decisions

2:50  Final Competency Role-Play  
(work in groups of four, 15 minutes/Facilitator)

3:50  Summary

4:00  Adjourn

4:00–4:15  Preparing for Attendance at First Steps Instructor Certification Course
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 2018, plan to 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, ACP conversation guides, 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 2018, audit 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 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. Apply three mentoring strategies to promote Facilitator certification and maintenance of competence.
4. Apply at least three Instructor mentoring strategies during role-play activities.

Agenda At-A-Glance

7:30 a.m. Sign In and Continental Breakfast
8:00 First Steps ACP Instructor Role and Responsibilities
9:00 Strategies for Teaching the First Steps ACP Facilitator Certification Course
   • Preparing to teach your own course
   • Teaching and presentation strategies
10:10 Certification Exam
10:30 Break
10:45 Instructor-Led Discussions
   Instructor candidates will work in pairs (as team teachers) to facilitate a 10-minute discussion with other participants who will role-play typical questions that arise during the First Steps ACP Facilitator Certification course
12:00 p.m. Lunch
12:30 The Role of the Instructor in Promoting Facilitator Certification and Maintenance of Competence
   • Mentoring strategies
   • Providing feedback during role-play exercises
1:15 Small Group Activities to Practice Giving Feedback
   • Each Instructor candidate will practice giving feedback using standardized role-play situations
3:15 Group Debrief
3:30 Creating Improvement Plans for Facilitator Competency
4:00 Adjourn
Certification Disclaimer
Respecting Choices is a division of C-TAC Innovations. The term “certification” as used in Respecting Choices educational programs and products means that 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.

Continuing Education (CE)
Nursing Contact Hours: Respecting Choices, a division of C-TAC Innovations, provider #588-004, is an approved provider of continuing nursing education by the Wisconsin Nurses Association, an accredited approver by the American Nurses Credentialing Center’s Commission on Accreditation. Registered Nurses will receive 7.0 contact hours for completion of each course: First Steps ACP Design and Implementation, First Steps ACP Facilitator Certification, and First Steps ACP Instructor Certification. The required online Facilitator course modules provide a total of 6.25 contact hours.

Social Work Credits: Respecting Choices, #1610, is approved as a provider for social work continuing education by the Association of Social Work Boards (ASWB), www.aswb.org, through the Approved Continuing Education (ACE) program. ASWB Approval Period: May 14, 2018 – May 14, 2019. Social workers should contact their regulatory board to determine course approval. Social workers participating in all three courses will receive 21.0 continuing education clock hours. Social workers will receive 7.0 continuing education clock hours for each course: First Steps ACP Design and Implementation, First Steps ACP Facilitator Certification, and First Steps ACP Instructor Certification. The prerequisite four online modules provide a total of 6.25 continuing education hours.
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)

Statement of Accreditation
This activity has been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education (ACCME) through the joint providership of the Wisconsin Medical Society and Respecting Choices. The Wisconsin Medical Society is accredited by the ACCME to provide continuing medical education for physicians.

AMA Credit Designation Statement
The Wisconsin Medical Society designates the required online Facilitator course modules only, for a maximum of 6.25 AMA PRA Category 1 Credit(s)™. Physicians should claim only the credit commensurate with the extent of their participation in the activity. An additional $200 fee is applied at time of registration. Please see www.respectingchoices.org/types-of-curriculum-and-certification/continuing-education/ for more information.

Planning Committee and Speakers
Stephanie Anderson, DNP, RN; Linda Briggs, MSN, MA, RN; Bernard J. Hammes, PhD; Carole Montgomery, MD; Sandra Schelling, MSN, APRN, NP-C; Patrice Tadel, MSN, RN; and Kathleen Ziemba, MSW, LCSW. Speakers and planners have an employment relationship with Respecting Choices. 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; Carole Montgomery, MD, FHM, CPE, MHSA; Sandra Schellinger, MSN, RN, NP-C, Patrice Tadel, MSN, RN; and Kathleen Ziemba, MSW, LCSW.

Day 2: First Steps Facilitator Certification speakers include Linda Briggs, MSN, MA, RN; Sandra Schellinger, MSN, RN, NP-C; Patrice Tadel, MSN, RN; and Kathleen Ziemba, MSW, LCSW.

Day 3: First Steps Instructor Certification speakers include Stephanie Anderson, DNP, RN; Linda Briggs, MSN, MA, RN; Sandra Schellinger, MSN, RN, NP-C; Patrice 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/fall-2018-national-first-steps-acp-conference/.

Additional information on speakers is available at www.respectingchoices.org/about-us/faculty/ or by emailing 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.

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, September 11 8 a.m. – 4:30 p.m.
Wednesday, September 12 8 a.m. – 4:00 p.m.
Thursday, September 13 8 a.m. – 4:00 p.m.
(Sign-in and continental breakfast begins at 7:30 a.m. each day.)
Registration Fees

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

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.

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.

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.

Respecting Choices®
PERSON-CENTERED CARE
A System for Person-Centered Decision Making that Transforms Healthcare
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“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.”

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

Learn from the experts in advance care planning

Space is limited. Register today!