

First Steps 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.

Organizations interested in replicating the First Steps ACP model will find it valuable to register representatives for all three days. Participants are welcome to register for any of the courses independently, based on their objectives.

**Respecting Choices<sup>®</sup>**  
PERSON-CENTERED CARE

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

Respecting Choices<sup>®</sup> is a registered trademark of GLMF, Inc.

**- VIRTUAL -**  
**FIRST STEPS<sup>®</sup>**  
**ADVANCE CARE PLANNING (ACP)**  
**NATIONAL COURSES**

**Fall 2021**

**Live Interactive Webinar**

**First Steps<sup>®</sup> ACP**  
**Design and Implementation Course**  
**Tuesday, September 28**

**First Steps<sup>®</sup> ACP**  
**Facilitator Certification Course**  
**Wednesday, September 29 OR**  
**Tuesday, October 5**

**First Steps<sup>®</sup> ACP**  
**Instructor Certification Course**  
**Wednesday, October 6**

# FIRST STEPS ACP DESIGN AND IMPLEMENTATION COURSE

The First Steps ACP Design and Implementation course is intended for healthcare and community leaders (administrators, managers, program directors, and others) and clinicians (physicians, advanced practice providers, nurses, social workers, and others) who are interested in implementing an effective First Steps ACP program within their organization or community. This course is appropriate for all levels of knowledge.

The purpose of this course is to describe and apply the elements of an effective First Steps ACP program within an organization or community.

**Course content level:** Beginning to Intermediate for social workers.

## Learning Outcomes

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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 three leadership strategies that guide the cultural transformation of person-centered ACP.
3. Explain four design elements and related strategies in designing a First Steps ACP implementation plan.
4. Apply knowledge to design a team-specific ACP implementation plan and workflows.

## Precourse Activities

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Click [here](#) for information related to precourse activities for virtual courses.

## Agenda At-A-Glance

*(All times reflect Central Time.)*

|            |   |
|------------|---|
| 12:30 p.m. | Log on and Registration   |
| 1:00       | Welcome and Overview  |
| 1:15       | Respecting Choices Core Concepts: The "Framework"   |
|            | Transforming the Healthcare Culture: Leadership Matters                                       |
| 1:45       | The Importance of a System: Creating a First Steps ACP Program<br>— The Four Design Elements  |
| 3:00       | <i>Break</i>  |
| 3:15       | Designing Your First Steps ACP Implementation<br>Small Group Implementation Planning Activity |
| 5:00       | Summary   |
| 5:15       | <i>Adjourn</i>  |

# FIRST STEPS ACP FACILITATOR CERTIFICATION COURSE

The First Steps ACP Facilitator Certification course is designed to help participants learn the skills needed to facilitate foundational ACP conversations with individuals who are healthy or have early chronic illness. This course is intended for a variety of professionals (social workers, nurses, health educators, physicians, clergy, and other care providers) and community volunteers. This course is appropriate for all levels of knowledge.

The purpose of this course is to assist participants in applying effective communication and conversation skills and critical thinking for person-centered ACP facilitation. These conversations have application for in-person visits and telehealth.

**Course content level:** Intermediate for social workers.

## 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. Demonstrate the application of the person-centered decision-making framework to elicit preferences and decisions.
3. Create strategies to transfer individual goals, values, and preferences to a written plan.
4. Demonstrate beginning competency in facilitating First Steps ACP conversations through role-play activities.

## Precourse Requirements/Activities

1. Complete Respecting Choices First Steps Online ACP Facilitator Curriculum modules 1–4 (included in registration fee).
2. Complete Personal Engagement Activity.
3. Review the advance directive (AD) document and AD guidelines appropriate for your organization/community.
4. Click [here](#) for information related to precourse activities for virtual courses.

## Agenda At-A-Glance

(All times reflect *Central Time*.)

|            |  |
|------------|--|
| 8:15 a.m.  | Log on and Registration  |
| 8:30       | Welcome and Overview   |
| 9:00       | The Personal Engagement Activity   |
| 9:15       | First Steps ACP Conversation Guide (for adults who have not started, or engaged in, a planning process) – Facilitation Skills                              |
|            | First Steps ACP Conversation Guide: Healthcare agent not present   |
| 9:45       | <i>Break</i>   |
| 10:00      | First Steps ACP Conversation Guide: Healthcare agent present   |
| 11:00      | Practice Exercise Role-Play 1 and Group Debrief  |
| 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 |
| 12:30 p.m. | <i>Lunch</i>   |
| 1:00       | Practice Exercise Role-Play 2 and Group Debrief  |
| 2:00       | First Steps ACP Conversation Guide: The CPR Conversation   |
| 2:30       | <i>Break</i>   |
| 2:45       | Practice Exercise Role-Play 3 and Group Debrief  |
| 3:00       | Summary of the First Steps Conversation – Promise #5: Honoring Preferences and Decisions   |
| 3:20       | Final Competency Role-Play   |
| 4:20       | Summary  |
| 4:30       | <i>Adjourn</i>   |

# FIRST STEPS ACP INSTRUCTOR CERTIFICATION COURSE

The First Steps ACP Instructor Certification course features strategies for teaching, evaluating, and mentoring the communication skills of First Steps ACP Facilitators, and prepares participants to teach the First Steps ACP Facilitator Certification course. This course is intended for healthcare educators, nurses, physicians, community leaders, social work practitioners, and chaplains and clergy who are interested in becoming certified to replicate the First Steps ACP Facilitator Certification course in their own organization or community.

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

**Course content level:** Intermediate to Advanced for social workers.

## 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.

## Precourse Requirements/Activities

1. Attend the First Steps ACP Design and Implementation course.
2. Be certified as First Steps ACP Facilitators.
3. Click [here](#) for information related to precourse activities for virtual courses.

## Registration Requirements

To attend the First Steps ACP Instructor Certification course, the Instructor candidate and sponsoring organization must sign an agreement to replicate the standardized Respecting Choices First Steps ACP curriculum. If no sponsor organization, the Instructor candidate may sign an agreement independently. Please contact Michelle Byom at [mbyom@respectingchoices.org](mailto:mbyom@respectingchoices.org) for more information.

## Agenda At-A-Glance

*(All times reflect Central Time.)*

|            |  |
|------------|--|
| 8:15 a.m.  | Log on and Registration  |
| 8:30       | Welcome and Overview<br>— First Steps Advance Care Planning (ACP) Instructor Role and Responsibilities |
| 9:00       | Preparing to Teach your Own First Steps ACP Facilitator Certification Course                           |
| 9:30       | Teaching and Presentation Strategies   |
| 10:40      | Certification Exam   |
| 11:00      | <i>Break</i>   |
| 11:15      | Instructor-Led Discussions   |
| 12:30 p.m. | <i>Lunch</i>   |
| 1:00       | The Role of the Instructor in Promoting Facilitator Certification and Maintenance of Competence        |
| 1:30       | Small Group Activities to Practice Giving Feedback   |
| 2:45       | <i>Break</i>   |
| 4:00       | Group Debrief and Summary  |
| 4:30       | <i>Adjourn</i>   |

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 ACP Facilitator Curriculum; and
- To observe Respecting Choices Faculty teaching strategies in preparation for Instructor Certification group discussion.

The auditor fee is \$250.

## Respecting Choices Certification

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Respecting Choices offers certification for Facilitators and Instructors associated with specified skills-based educational programs and courses for ACP and SDMSI, which includes:

- 1) The use of standardized curricula, conversation guides, and materials;
- 2) Competency validation through demonstrated acquisition of knowledge and skills;
- 3) Completion of initial certification requirements; and
- 4) Ongoing maintenance of competency and/or recertification (as applicable).

## Planning Committee and Speakers

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Stephanie Anderson, DNP, RN; Carole Montgomery, MD, FHM, CPE, MHSA; Patrice Tadel, MSN, RN; and Kathleen Ziembra, MSW, LCSW

We are a provider of the course, but we do not endorse any commercial products in conjunction with the course. Off-label use of any products will not be discussed.

**Respecting Choices Instructors include, but are not limited to:** Patrice Tadel, MSN, RN; Kathleen Ziembra, MSW, LCSW; and Joyce Smerick, BS

Additional information is available at [www.respectingchoices.org/about-us/faculty/](http://www.respectingchoices.org/about-us/faculty/). Instructors for each course are at the discretion of Respecting Choices and may be subject to change, including replacement with qualified substitutes. Up-to-date information regarding speakers is available by emailing [info@respectingchoices.org](mailto:info@respectingchoices.org).

## CONTINUING EDUCATION (CE)

### Nursing Contact Hours

Respecting Choices is approved as a provider of nursing continuing professional development by the Wisconsin Nurses Association, an accredited approver by the American Nurses Credentialing Center's Commission on Accreditation.

Nursing credits for the total number of hours that one participant can earn for successful completion of the courses are **4.0** contact hours for First Steps ACP Design and Implementation course, **7.0** contact hours for First Steps ACP Facilitator Certification course, and **7.0** contact hours for First Steps ACP Instructor Certification course. The Online ACP Facilitator Curriculum provides a total of 6.25 hours of instruction for **6.25** contact hours.

### Social Work Credits

Respecting Choices, #1610, is approved to offer social work continuing education by the Association of Social Work Boards (ASWB) Approved Continuing Education (ACE) program. Organizations, not individual courses, are approved as ACE providers. State and provincial regulatory boards have the final authority to determine whether an individual course may be accepted for continuing education credit. Respecting Choices maintains responsibility for this course. ASWB Approval Period: May 14, 2019–May 14, 2022.

Social workers participating in all three live interactive webinar courses will receive **18.0** continuing education credits.

Social workers will receive **4.0** continuing education credits for First Steps ACP Design and Implementation course, **7.0** continuing education credits for First Steps ACP Facilitator Certification course, and **7.0** continuing education credits for First Steps ACP Instructor Certification course. The prerequisite Online ACP Facilitator Curriculum provides a total of **6.25** continuing education credits.

**Please note:** Precourse activities included as part of course preparation do not have CE credit provided.

To receive CE credit/certificate of completion, nurses and social workers must complete the following:

- Complete the prerequisite Online ACP Facilitator Curriculum (applicable only to First Steps Facilitator Certification course).\*
- Complete precourse requirements/activities.
- Be present for the entire course.
- No partial credit will be given.
- Complete online evaluation and attestation statement. CE certificates will be sent by email (or as requested by mail) following online submission of course evaluation within 30 days of attendance.

\* **Note:** After completing the prerequisite online modules, you will receive CE certificates for a total of 6.25 contact or continuing education hours. Verification of online module completion occurs electronically prior to the course.

## Live Interactive Webinar Virtual Course Participation

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Full attendance and engagement throughout the entire course is required. An email will be sent to registrants with the Zoom meeting invitation, login information, and links to precourse and course materials for the registered virtual course(s). Each attendee must log on individually on a computer with working audio, video, and internet access. Registrations are accepted up to **1 week** before the course offering. Any questions or considerations, please contact Michelle Byom at 608-473-1802, or [mbyom@respectingchoices.org](mailto:mbyom@respectingchoices.org).

## Accommodations

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In accordance with the Americans with Disabilities Act, Respecting Choices is committed to making national courses accessible to all. If you require special assistance/accommodations, please contact Michelle Byom at 608-473-1802, or [mbyom@respectingchoices.org](mailto:mbyom@respectingchoices.org).



## Registration Fees

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|  |       |
|--|-------|
| First Steps ACP Design & Implementation Course   | \$250 |
| First Steps ACP Facilitator Certification Course   | \$475 |
| First Steps ACP Facilitator Audit<br>(For previously certified First Steps ACP Facilitators) | \$250 |
| First Steps ACP Instructor Certification Course  | \$495 |

Fees include classroom instruction, course materials, and continuing education credit.

## Cancellation Policy

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We offer a full refund minus a \$50 administrative fee for cancellations made more than 30 days prior the course date. Seating is limited, so registrations canceled within 30 days of the course date are not refunded. If Online ACP Facilitator Curriculum modules are started, the cost of the modules will also be deducted from your refund.

## Transfer Policy

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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 U.S. cannot be certified as Respecting Choices Instructors unless part of a license agreement with an organization. If interested in becoming certified as an Instructor, contact Respecting Choices at [info@respectingchoices.org](mailto:info@respectingchoices.org).

## Grievances/Comments/Concerns

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If you have any questions or concerns about these courses, please contact Pat Tadel at 608-473-1972, or [ptadel@respectingchoices.org](mailto:ptadel@respectingchoices.org).