My Wishes, My Care

Community-led
Advance Care Planning
sessions for the public

Community
Partner Guide

BC Centre for
Palliative Care

October
2020

Prepared by the BC Centre for Palliative Care

How to use this interactive document:

Click on the topics listed in the **Table of Contents** to navigate directly to that topic and page. To return to the table of contents from any page, click on "**Table of Contents**" link on the bottom left corner of each page.

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About the Guide

This Community Partner Guide forms one piece of the toolkit for the **My Wishes, My Care: Community-led Advance Care Planning sessions for the public.**

Intended to be used together with the Program Overview, this document provides key information and instructions for organizers at community partners who are planning to host the Advance Care Planning sessions.

See Appendix A for a printable planning checklist.

Physical Venue Considerations

Here are some recommendations to consider when choosing a physical venue for your Advance Care Planning (ACP)s. Ideally a venue will provide a physical environment that is welcoming for all attendees.

Inclusion, Accessibility

Distinct features, such as landmarks or other visual cues, help people, including people with disabilities, unfamiliar with a location understand where they are and identify which way they should go.

Examples:

- [ ] easy to find and get into.
- [ ] landmarks and/or distinctive structures to help wayfinding.
- [ ] parking close by
- [ ] clear and legible signage placed at eye level
- [ ] clearly marked accessible washrooms
- [ ] mixed or family washrooms that allow care partners or family members to provide assistance if needed.

Comfort, Safety

Choose calm, welcoming, informal and pedestrian-friendly spaces.

Examples:

- [ ] flat, wide and unobstructed sidewalks leading to the venue
- [ ] if meeting in the evening: well-lit entrances
- [ ] one-level building or available elevator
- [ ] space is quiet and a way from background noise
- [ ] space is not cluttered
- [ ] close to a washroom
- [ ] lighting is adequate
- [ ] avoid large mirrors and highly reflective floors
- [ ] consider displaying large clocks in different areas of the space. Using both analog and digital can be helpful.

Adapted from:

- Alzheimer Society Canada. (2016, January). Dementia-Friendly Communities Local Government Toolkit.
  https://alzheimer.ca/sites/default/files/files/bc/advocacy-and-education/dfc/dfc_toolkit_v.jan2016.pdf

- Alzheimer Society of B.C. Making your workplace dementia friendly.
  https://alzheimer.ca/sites/default/files/files/bc/advocacy-and-education/dfc/final_recreation.guide__1.pdf

Choosing a Platform

You are welcome to use any platform of your choice that adheres to your organization's best practices and policies.

Examples of online platforms that you can use to host the ACP sessions:

Platform	Pricing & Features
Zoom	https://zoom.us/pricing
Microsoft Teams (replacing Skype for Business)	https://www.microsoft.com/en-us/microsoft-365/microsoft-teams/compare-microsoft-teams-options
GoToMeeting	https://www.gotomeeting.com/en-ca/meeting/pricing?

When making your choice, we recommend keeping in mind the key features below.

Key Features

- ☐ Raise hand feature
- ☐ Chat box
- ☐ Video functionality
- ☐ Mute/unmute microphone
- ☐ Screen sharing capability (e.g. for PowerPoint slides)
- ☐ Provides a phone number for participants to call into the event/session
- ☐ Co-host feature (ie. can appoint someone other than the host to have access to the same features as the host)
- ☐ Host and any co-host(s) can enable/disable the microphones and cameras of participants

Optional Features

- ☐ Interactive polling features to encourage audience engagement
- ☐ Breakout rooms (Zoom only)

Security and Privacy Best Practices

- **Be cautious of free versions** of online platforms due to potential security concerns, limited features, and limited meeting lengths.
- **Do not ask participants to share any personal or medical information**.
- **Do not share meeting links/numbers on public platforms/social media.** Require participants to register for the Programs and email the meeting link/number after registration is complete.
- **Settings to enable/disable on the platform:**
  - **Do not record** any events or session.
  - **Do not save** the chat logs.
  - **Set up a password** to join the meeting (if settings allow)
  - **Set up a waiting room/lobby** to stop guests from joining the meeting until you are ready to admit them individually. This would allow you to review the attendance list ahead of time.
  - **Restrict screensharing to only the host and any co-hosts.**
- **Inform participants ahead of time** (ie. in the registration and reminder emails, see Appendix B):
  - The event/session will <u>not</u> be recorded.
  - They can join the meeting using their first name or a nickname.
  - They may choose to turn off their camera/microphone when they are joining the meeting
    - o Camera and/or microphone use is encouraged during discussions but is not mandatory. Participants may also contribute using chat functions, hand raises, polls, etc.

Tips for Successful Remote Delivery of Programs

- All operators of the online or conference call platform (facilitators, tech support, etc.) should be familiar with the platform operations and key features.
  - A rehearsal of the event/sessions ahead of time is highly recommended.
- Select a physical space that is quiet, free of distractions, and has good internet/phone connection.
- Recommend offering a test-run or tutorial for participants on a different day prior to the session to try the features and resolve any technological barriers.
- Offer logging in 15 minutes before the session start time to allow people to login and troubleshoot, reducing the chance it starts late due to technical difficulties.
- Recommend having an additional role when hosting sessions online - the host - this person provides technical support, and can pay attention to raised hands, chat messages and questions, allowing the facilitator(s) to focus on delivering content.

Tips specific to facilitators can be found in the *Facilitator Guide*.

Partnering with others

Partnerships with other organizations or individuals who can help promote your sessions is a powerful force multiplier: they are mutually beneficial and extend your impact in the community.

Partners can help you with:

- providing a meeting space for the session
- making a financial donation to cover costs such as printing or refreshments
- sharing their experience working with community media
- exerting influence in the community, for example with influential health-care providers or community leaders
- engaging those who would benefit from Advance Care Planning.

Partnering with other community organizations should help both organizations connect to their community.

One example of such an arrangement is if an organization does not have the resources or expertise to provide facilitators, but is interested in hosting and promoting sessions where your facilitators run the sessions. Some organizations you may consider:

- Service clubs
- Business associations
- Health-care providers and organizations
- Libraries
- Social service agencies
- Faith communities
- Seniors' centres
- Multicultural agencies
- Unions and professional associations

Registration

- Establish a registration process to track the RSVP responses. Recommended capacity for sessions is 6-20 participants for in-person sessions, and 6-12 participants for online sessions.
- After RSVP responses have been received, you should share the information below in an email to the registrants and a reminder email 1-2 days before the session (refer to Appendix B for email templates).
  - Share more details about the session: length of session, how the session will be conducted, perhaps a more detailed description
  - Re-emphasize out-of-scope topics
  - For online sessions
    - o Share the invitation to the online event
    - o Organize an online platform tutorial before the session.
    - o Share information about privacy and security.
    - o Share instructions for the online platform.
  - Provide contact information (including a phone number) for someone who can help if they have issues on the day of the session.
  - Ask if the registrant has any questions.

Scheduling

- Schedule your sessions **after facilitator training** has been completed. Ensure enough time for facilitators to review the toolkit, prepare for the sessions and complete other post-training actions, e.g. a practice session with peers. We recommend scheduling the first event at least 2 weeks post training.

Promotion

You can have the most dynamic facilitator presenting compelling content with top-notch workbooks and materials, but if no one attends, it makes no difference. What follows are tips for promoting the Community-led Advance Care Planning sessions for the public.

Create a Communications Plan: Communicate with Intent

Investing time in creating a communications plan is valuable not only for the current promotion, you can re-use a successful plan for future endeavours.

A good plan gets the right (consistent) message to the right people using the right vehicle.

Planning involves:

1. **Identifying the purpose of your communication**
   - What are you trying to achieve? You might want your audience to change a behaviour, register for an event, learn more about a topic, or simply be aware of an issue.

2. **Identifying the audiences you are trying to reach**
   - Who are you talking to? You may have tiers of audiences; who must know this information vs. those that should simply be aware of it.

3. **Planning and designing your message**
   - What does your audience need to know? Keep your primary messages simple and easy to remember. You can identify some "nice to know" messages that you'll use to support your primary messages.

4. **Delivering the messages**
   - How will you reach your audience? Taking into account the resources (financial and human) available to you, decide what tactics you are going to use. This can include leveraging existing networks, distributing printed materials to places your audiences gather, strategizing how to connect with traditional media, or deciding how to use social media channels (yours or your champions' and partners').

Key Messages about Advance Care Planning

- Advance Care Planning is a process of thinking, talking and planning (Think, Talk, Plan) that involves understanding and sharing your values, beliefs and wishes regarding health and personal care. It may also include choosing who would make these care decisions for you if you cannot do so.
- Advance Care Planning is an integral part of personal planning that every adult should do; it is part of being a healthy citizen.
- The sooner you start the process of Advance Care Planning, the better.
- Advance Care Planning helps you and your family prepare to make decisions about your health care.
- Advance Care Planning provides peace of mind to you and your family:
  - it provides reassurance to your family that they know what you would want; and
  - it provides reassurance to you that your health-care wishes are known.
- Conversations about Advance Care Planning get easier the more you have them.
- Advance Care Planning is not just a one-time event, it is a process that you should revisit throughout your life.
- You can change your Advance Care Plan at any time.
- You have options for how you want to express and record your wishes. Legal documentation in an Advance Care Plan is helpful but not essential.
- As long you are able to understand and communicate, you will make your own health-care decisions.

In general, great messages **harness the power of storytelling.** Personal accounts that show the value of ACP or the costs of not planning for care can be very persuasive. Talking about things that many people don't want to talk about can make discussing Advance Care Planning more normal. Back up your passion with facts.

Modes of Communication

The modes of communication you decide on in your communications plan will depend on what you need to communicate, and to whom.

Some popular methods for getting the message out:

- Word of mouth.
- Your organization's website, blog, and social media accounts.
- News stories in print and broadcast media (identify community media outlets and learn their publishing or broadcasting schedule and deadlines. In diverse communities, seek out media outlets and social media platforms that provide services in the primary language of the community).
- News releases.
- Printed materials like posters, brochures and fliers (locate community notice boards at libraries, grocery stores, coffee shops, community centres).
- Outreach and presentations to other health and community service providers and to community groups and organizations.
- Special events and open houses that your organization holds.

Marketing Tips

Advertising

Advertising is a powerful tool; you can use it to raise brand awareness, launch new products and communicate with target audiences. Ad messages can be:

- broadcast on TV and radio (there are often free options such as in the community calendar sections)
- published in a newspaper (print and online versions)
- printed and posted in a public space
- shared on social media channels

What makes a good advertisement?

Think about the ads you have seen in the last week. Some were good, and some were undoubtedly bad. A good ad:

- connects with its audience;
- is memorable and easily recalled;
- conveys information quickly and succinctly; and
- provides a clear call to action.

Here are some best practices to consider when developing advertising to promote Advance Care Planning information sessions and your organization.

Clear call to action

This goes back to the very first question in your communication plan—what do you want to achieve? A call to action is the reason you're advertising, and should be the strongest message your audience comes away with. The call to action should be well-thought-out and clearly defined. It should be easily found in the ad so it's not overlooked.

Defining your call to action early in the design process will aid with other decisions to come. The message you want to deliver will influence what images you pick, the headlines and text you write, and how the finished ad looks.

When advertising Advance Care Planning information sessions, the call to action is to "register and attend the session".

However, since Advance Care Planning may be a brand new concept to your audience, and your organization may be new to them as well, you may incorporate other, more subtle, calls to action that support the main one, such as "start thinking about Advance Care Planning" and "learn more about us".

Effective Design Elements

Compelling image

Research shows that an image – a photograph or illustration – is usually the first thing people notice in an ad, so using a strong, compelling image is one of the best ways to capture your reader's attention.

A well-chosen image isn't just decoration: you want to select a photo that illustrates your key message or call to action. For Advance Care Planning, the focus is on thinking about and sharing what matters most to you, which can be illustrated with photos of family members in a conversation or enjoying life. You can use either original or stock photos in your advertising. Just make sure they convey the message you want told.

Strong headline

We are no longer readers, but scanners. You have just a second or two to engage your audience to read more about your message, so a strong headline is key. A headline should be short, attention-grabbing and convey enough useful information to draw them in to learn more.

Tight, well-written text

Now that you've got their attention, it's time to reward the reader with well-written text that is creative, concise, compelling, relevant and easy to read.

Stay laser-focused on your key message and call to action. When advertising an event, be sure to include the event details: date, time, location and registration contacts.

This is not the place to use jargon or provide excessive information that doesn't contribute to the overall message. Instead, use your audience's language – pick words and a writing tone that is likely to attract the type of person you want. It helps to address your readers directly by using "you" or "your" in your ads so that you're speaking directly to them.

Answer this question for your reader: "what's in it for me?". The reader has to believe that everything that you are asking of your reader—both reading the ad and registering for the sessions—is in their best interest.

Logo and Contact information

Be sure to identify your organization and any partners. At minimum, include your organization's logo and at least one way to contact you, ideally a link to your website, or directly to the registration page. Make the link easy to remember, and make sure it takes users right to the relevant information.

Whether to include your mailing address, phone number, email and/or website depends on your audience's preferences, and what you want them to do with that information.

Promotional Resources

Media Outlets

- Wikipedia. Media in Vancouver https://en.wikipedia.org/wiki/Media_in_Vancouver

- ABYZ New Links: British Columbia Newspapers and News Media Guide http://www.abyznewslinks.com/canadbc.htm

Social Media

- AMSSA [Affiliation of Multicultural Societies and Service Agencies of BC]: Migration Matters Issue 26, November 20, 2015: New Canadians' Journey Through the Social Media Landscape. https://www.amssa.org/wp-content/uploads/2015/04/AMSSA-Info-Sheet-Issue-26-Social-Media.pdf

- Association of Canadian Advertisers: Why Your Multicultural Strategy Has to Be Digital First. October 5, 2017. https://www.amssa.org/wp-content/uploads/2015/04/AMSSA-Info-Sheet-Issue-26-Social-Media.pdf

- Eventbrite. How to Promote an Event on Social Media in 12 Steps. https://www.eventbrite.com/blog/how-to-promote-event-social-media-ds00/

- SocialPilot. 9 Effective Ways to Use Social Media to Promote Events. https://www.socialpilot.co/blog/social-media-to-promote-events

Evaluation

Evaluation of your sessions is an important step in checking you are meeting the needs of your participants, and helping you improve future sessions. Below are checklists of the things to be done with the evaluation survey that we provide to you in the toolkit.

In-person Sessions

Before the session, the person responsible for Advance Care Planning in your organization (the 'ACP lead') will:

- Identify a staff or volunteer to be responsible for printing, distribution and collection of the evaluation surveys (see Appendix C).

- Ask the session facilitator to mention at the beginning of the session that evaluation forms will be distributed to the participants at the end of the session.

At the end of the session, the person assigned by the ACP lead will:

- Distribute the evaluation forms (with pens) to the participants
- Collect completed forms
  (Tip: You may wish to provide a box for people to place their completed forms into rather than handing them directly to you.)
- Handover the completed evaluation forms to the Project Lead

After the session, the ACP lead will:

- Review the evaluation forms with the session facilitators, noting strengths and areas for improvement

- Arrange for the data from the evaluation forms to be compiled and a summary report prepared. The evaluation results can be used to demonstrate to potential funders or sponsors how people in your community value and appreciate the ACP sessions hosted by your organization.

- Please ensure any original or copied forms are stored in a locked cabinet until destroyed by shredding.

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Appendix A – Planning Checklist

Organizers of the Community-led Advance Care Planning sessions may use the checklists below to stay organized and on track when planning the sessions.

Pre-Session Preparation

Budget	
Project leadership/coordination	
Volunteer recruitment	
Expenses for facilitators to attend training	
Venue (if required)	
Remote delivery platform (if required), *e.g. online and/or conference call platform subscription*	
Advertising	
Printing	
Refreshments	
Volunteer expenses, *e.g. mileage, parking, honorarium*	
Admin costs	
Total:	

Community Partners *(consider seniors' centres, libraries, community halls, health-care providers, schools, faith communities, multicultural agencies, media)*		
Name/Organization	**Phone/Email**	**Role**

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Pre-Session Preparation, continued

Training of Peer facilitators			
Task	Person Responsible	Completion Date	Completed
Recruitment/screening of facilitators			
Orientation to the role*			
Registration for the training			
Travel and accommodation for attending the training arranged (if required)			
Pre-requisites* completed by facilitators prior to attending training			
Post-training de-brief with facilitators and identification of further learning needs			
Ongoing support of the facilitators planned			

* see Program Overview

Session Planning

Session Information	
Timeline {Consider lead time for booking venues and promoting the session)	
Title for session	
Date of session	
Time of session	
Location of session (name and address; venue capacity; parking; platform information if remote delivery)	
Session coordinator/contact person	
Planning group (names and contact info)	
Target audience	
Description of session	

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Session Planning, continued

Task	Person Responsible	Completion Date	Completed
Confirm facilitators			
Secure venue or platform			
Create promo material e.g. • Poster (use available templates) • Website • Ad for newspaper • News release • Social media • Email notice			
Distribute promo material			
Registration process			
Refreshments (if required)			
Supplies and Equipment, *e.g.* • Signs to post outside venue • Sign-in sheet • Name tags • Evaluations printed • Handouts printed • Additional resource materials • PowerPoint • Flip chart • Laptop and projector • Paper, pens, sticky notes, etc.			
Additional staff/volunteers at event/roles, *e.g.* • Greet participants • Registration • Facilitate small groups at tables or break out rooms • Technological support • Refreshments • Set up / clean up			
Venue set up / clean up			

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Post-Session

Task	Person Responsible	Completion Date	Completed
Debrief with facilitators			
Review evaluations, share with facilitators			
Follow up on outstanding issues from the session, *e.g. requested information or complaints*			
Compile data from the evaluations and prepare summary report			
Store evaluation forms in locked cabinet until shredded			
Follow up on post-session media opportunities			
Say thank you to volunteers, partners, supporters			
Celebrate!			
Amend plan for next ACP sessions/ event *Include feedback of participants, facilitators, volunteers and others involved in the project*			

Appendix B:
Email Templates for Advance Care Planning Sessions

The email templates below can be adapted to suit the needs of your organization.

Registration Confirmation Email

Subject:

Registration Confirmation - *<insert name of event, dates & times>*

Content:

<Greeting>

Thank you for registering for *<name of event>*. This session will be held *<Date, time, location (in-person or online)>*

The session will be led by experienced facilitators of <organization name> where you will learn about:

• the steps to Advance Care Planning

• how to make an advance care plan

• resources to help you get started in making your own plan

This session will **not** include:

• help with completing any Advance Care Planning legal documents (though you will be provided information and resources on these documents)

• advice regarding your personal situation

What to bring to the session:

• A notebook to record notes <add for in-person sessions: *though we will also be providing paper and pens to take notes with>*. Handouts summarizing the information will be shared after the session

<You can include the sections below if the session is being held online:>

• The link (meeting URL) for the session is below. Please note we will open up the online session *<time: e.g. 15 minutes before start time>* to provide technological support.

• *<insert online platform link for part 1 >*

• <We recommend providing some instructions for using the online platform - this example is for Zoom:>

   - Click on the following link to access a tip sheet on using ZOOM: http://cean.vch.ca/wp-content/uploads/sites/26/2020/06/Zoom-Guide-003.pdf

- If you need help accessing the event on the day of the event, please call *<contact name for tech support personnel>* at *<contact phone>* or e-mail *<contact email>*.

- If you are unfamiliar with the *<remote platform>* we will be offering a tutorial and trial run *<date and time>*.
  <insert online flatform link/phone number and any login information for tutorial>

<We recommend adding a privacy statement for online events. An example is below for Zoom and can be adapted for any platform:>

Important privacy notification:

This event will be delivered by *<organisation>* (the host) through *<Zoom>* which is hosted on *< servers in the U.S.>*. This event will not be recorded. If you have concerns regarding your personal privacy during the event, you can choose to

- Provide only your first name or nickname when you join the online event

- Keep your camera off

- Keep your microphone muted when you are not speaking

<Organisation> will not share any personal information shared by the participants before, during or after the session. *<Organisation>* complies with *<the Freedom of Information and Protection of Privacy Act (FIPPA)>*.

Please get in touch if you have any questions. If you can no longer make the session, please let us know.

Best regards,

<Sender's name and email signature>

Reminder Email (1-2 days before the session)

Subject:

Session Reminder - *<insert name of event, date & time>*

Content:

<Greeting>

This is a friendly reminder about *<name of event>* to be held *<date, time, location>*. We are looking forward to hosting this session for you. If you can no longer attend the session or have any questions please contact me at *<email and/or phone number>*.

You can include the sections below if the session is being held online:

- The link (meeting URL) for the session is below. Please note we will open up the online session *<time: e.g. 15 minutes before start time>* to provide technological support.
  <insert online platform link >

- We recommend providing some instructions for using the online platform - this example is for Zoom:

Click on the following link to access a tip sheet on using ZOOM: http://cean.vch.ca/wp-content/uploads/sites/26/2020/06/Zoom-Guide-003.pdf

- If you need help accessing the session on the day of the session, please call *<contact name for tech support personnel>* at *<contact phone>* or e-mail *<contact email>*.

At the very end of this email is information that was shared previously about the session.

Best regards,

<Sender's name and email signature>

<Include registration confirmation email content (discussion guidelines, out-of-scope topics, privacy, etc.)>

Post-Session Email

Subject:

Thank you for attending *<name of event>*

Content:

Thank you very much for attending <name of event>.

We hope you feel more ready to start or continue your Advance Care Planning.

The following resources are attached to this email *<we recommend emailing these resources even if you hosted the event in-person>*

- *<information on the participant handouts you will be sharing>*

- *<information on any additional materials you would like to share from the Resources for Facilitators list in the Facilitator Guide>*

<You can include this section if the session was held online> We are always learning how to improve our workshops, so would really appreciate your feedback. **If you did not complete the survey at the end of the session** – please click the link below to provide your feedback.

<evaluation survey link>

If you have any additional questions, please feel free to e-mail me.

Thank you to our facilitators *<facilitator(s)'name(s)>* from *<organisation>*. If you want to find out more about *<organisation>*, please visit our website *<website link>*

Best regards,

<Sender's name and email signature>

Appendix C: Evaluation Survey

To be added

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All British Columbians affected by serious illness will have equitable access to compassionate, person-centred care and resources.