



Plan Ahead: Facilitator Guide

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Covenant Health
Palliative Institute

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About the Plan Ahead Facilitator Guide

What is in this resource?

The Plan Ahead Facilitator Guide is one part of the Plan Ahead Toolkit, a resource designed to equip community leaders, groups and organizations with the information needed to offer public Plan Ahead education sessions on health and personal, financial and estate planning. The facilitator guide contains supporting content for facilitators to host Plan Ahead sessions. The other components of the Plan Ahead Toolkit include:

- **Plan Ahead Alberta** - information on health, financial and estate planning in Alberta
- **Plan Ahead Presentation Slides** - ready-to-use slides and speaker notes
- **Plan Ahead Starter Kit** - print resources for facilitators to share with participants in Plan Ahead education sessions
- **Evaluation Survey** - a survey for participants to complete at the end of a Plan Ahead education session

Please note that this is not an exhaustive resource on planning ahead for all situations. It is intended to introduce the essential planning processes and documents in Alberta.

Thank you for helping your community to plan ahead!



Facilitating a Plan Ahead session

Get to know the Plan Ahead Toolkit

Review the Plan Ahead Alberta content to familiarize yourself with it and become comfortable with how the concepts are presented. This material emphasizes the three main planning ahead documents: a **personal directive**, an **enduring power of attorney** and a **will**. The facilitator guide and slide deck follow the same structure.

Prepare for the presentation

The slide deck includes detailed speaker notes to assist you and can be used without making any changes. The slide deck is approximately 30 minutes of content without activities or discussions. Decide if you will share a story or your own experience. You may wish to include additional activities to encourage group participation. Build this into the content in a way that feels natural and augments the course material. Example activities are listed [here](#).

It is optional to invite content experts to co-present any part of the session. For guidance on finding a co-presenter, please email the Covenant Health Palliative Institute at palliative.institute@covenanthealth.ca.

Print a copy of the speaking notes for the slide presentation. Even if you intend to use the “speaker view” when presenting, it’s a good idea to have a printed copy of the notes as a backup. To do this, open the PowerPoint presentation and select “File” and “Print”. Change the print layout from “Full Page Slides” to “Notes Pages,” and click “Print” again.

Rehearse! Feeling confident with the material and your preparation will go a long way towards easing any nervousness. Check your timing to ensure you don’t run too long and you leave adequate time for participation, discussion, and questions.

Publicize the session in your organization’s newsletter, website, email and social media. You could use posters and community events sections on other websites. Ensure your advertising includes the date, time, location, and contact details.

Access the Plan Ahead Starter Kit. It includes recommended resources that support individuals to plan ahead. The Starter Kit is available electronically and you should print it to share with participants.

On the day of the session

- Arrive at least 30 minutes early.
- Set up and test audio-visual equipment.
- If the course is **online**, make sure to select “share sound” when you start sharing your screen so the embedded video will be audible to participants.
- If the course is **in person**, you will need to connect your computer to the internet (for streaming the video), as well as a projector and sound system.



- Test the video in advance to make sure it is working properly, and the volume is appropriate.
- If the session is in person, arrange the seating. Consider seating people at tables to make it easier for them to write notes. This would also enable small-group discussion at the tables during the session.
- If the session is in person, set out supplies: Starter Kit materials, participant surveys, pens, tissue, nametags (optional).
- **Optional:** Make additional resources available, such as brochures and guides for local health, social service, non-profit organizations.
- **Optional:** Serve refreshments or make it a Lunch 'n' Learn and invite participants to bring their lunch with them.

Addressing challenging situations

Below are some potentially challenging situations that may occur and suggestions for how to handle them.

No one is speaking up or responding to the cues for questions.

- Keep it relaxed. Don't panic or draw attention to the lack of verbal participation.
- Let people know that many types of participation are welcome: sharing verbally, writing notes, reflecting quietly, typing in the chat (if online).
- Rephrase the question; sometimes re-phrasing can help people think about the topic differently.
- Try "warm calling." "Cold calling" is when you put someone on the spot without warning; with "warm calling" you give people time to think about a question (and even write down their thoughts) before inviting discussion.
- Share a personal story. Your vulnerability may encourage participants to open up.
- If the course is in-person, invite people to discuss in small groups.

Someone is dominating the conversation or getting off-topic.

- Thank them for their contribution and redirect the conversation to the larger group, "What do others think about this?"
- Re-focus the conversation by bringing it back to the topic at hand, e.g. "That is a good question. We're going to talk about that later in the session," OR "I'd love to chat about this with you more at the end of our session."
- Remind the group of the purpose of the session and redirect to session materials.

Someone becomes emotional.

- Normalize, validate and/or acknowledge their emotions.
- If someone is angry, try not to take it personally; it is rarely about you. Keep your voice calm. Acknowledge the emotion underlying their anger, e.g. I hear that you



are frustrated/fed up, etc. If possible, check in with the participant after the event. You may also provide resources for support (if desired).

Someone complains about the health care they/someone close to them is receiving/received.

- Encourage them to share their concerns with the health care provider and/or contact the Alberta Health Services Patient Relations Department (or the Patient Relations department where they received care).

Someone seeks personal health advice or advice on behalf of someone they know.

- Avoid offering advice; instead, direct people to the appropriate resources or services where they can find more information or get the care they need.

General tips for facilitators

Identify your target audience.

This will help you tailor your message to meet the needs of the group. Consider age, health status, cultural background, gender, location, and other aspects of the people who will attend your event.

Find a format that best suits your needs.

Supporting your community members in planning ahead can be done through different formats such as: presentations, webinars, workshops, conversation cafes, book clubs, games, and podcasts.

Develop informative material for your initiatives.

Use the information in this toolkit to create your own material such as booklets, flyers, checklists, presentations, brochures, fact sheets, videos, worksheets, and guides as is relevant to your community (e.g., translating, adapting to different cultural contexts).

Leverage the power of stories.

Storytelling can help to engage, motivate, and inspire people by creating a memorable and relatable experience that illustrates the importance of planning ahead.

Partner with local healthcare providers, lawyers, financial planners, social workers, community organizations and other professionals.

Refer as needed and do not answer health/legal questions or provide information beyond your scope of understanding. These individuals and groups can provide expertise, credibility, accessibility, connections, and resources to support planning ahead in the community.



Compassionate Alberta has resources to support you.

Find conversation starters, games, workbooks, quizzes, checklists and more to support you in creating and implementing planning ahead initiatives in your community.

Create a safe space for learning and sharing:

- Set expectations from the beginning.
- Role model the behaviors, and language you want to see.
- Use plain language because it is inclusive and does not require prior knowledge or expert language skills. It also helps to ensure that everyone can understand the message.

Evaluate your sessions.

Use the [evaluation survey](#) with your attendees to understand how effective your initiative was and how it can be improved. As a facilitator, please share feedback with the Palliative Institute and report any questions, issues or concerns related to course material with our [facilitator evaluation survey](#).

