

Empowering Organizations with the Plan Ahead Toolkit: Training with the Plan Ahead Toolkit

Presenter:

Ellen Mi, Project Coordinator, Covenant Health Palliative Institute

Guest Speakers:

Vineeta Kapoor, Manager of Seniors Supports & Volunteers Unison at Kerby Centre

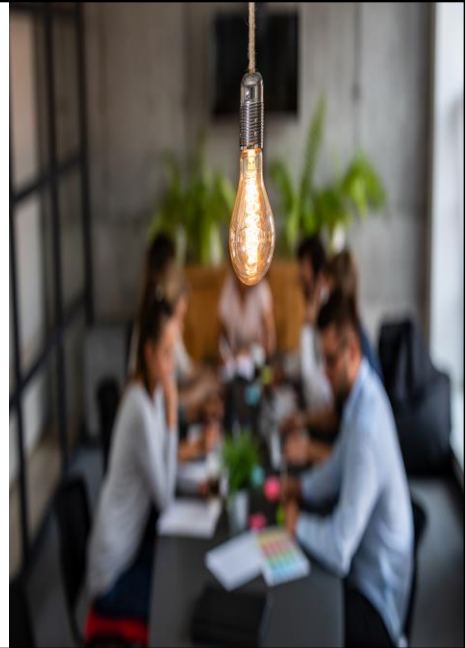
Naxhielli Donaji Mendez Muniz, Volunteer, Vaccine Navigators' Team, AIMGA

Host:

Manpreet Tatla, Program Assistant, Covenant Health Palliative Institute



Date:
September 9th, 2025



Good morning, everyone. Thank you for joining the session on Empowering Organizations with the Plan Ahead Toolkit. I am Manpreet Tatla, Program Assistant at the Covenant Health Palliative Institute. I would like to introduce our presenter for today's session, Ellen Mi. Welcome Ellen and over to you now.

I am the Project Coordinator with the Covenant Health Palliative institute. I would like to introduce our guest speakers for today's session, Vineeta Kapoor and Naxhielli Donaji Mendez Muniz. Vineeta Kapoor is the Manager of Seniors Supports and Volunteers at Kerby Center, a role she has passionately held for over eight years. With a deep commitment to enhancing the lives of seniors, Vineeta leads a dedicated team that assists clients in accessing benefits, pensions, affordable housing, free tax filing services, and vital community resources.

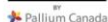
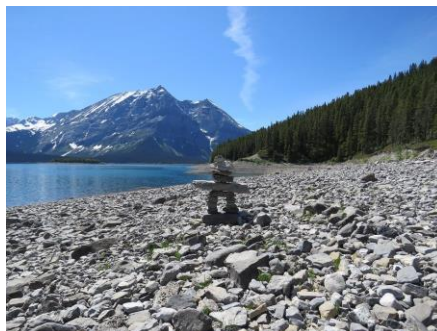
Naxhielli is an International Medical Graduate from Mexico who completed her anesthesia residency and pain medicine specialist degree at the National University of Mexico (UNAM). She has worked as a rural physician, Anesthesia and Pain Specialist in Mexico City, training residents and caring for patients. As AIMGA member since 2017, Naxhielli has volunteered on multiple projects, she is currently

part of the AIMGA Vaccine Navigators' Team.

Welcome Vineeta and Naxhielli!

Land Acknowledgement

We acknowledge that we are located on Treaty 6, 7 and 8 territories. We respect the histories, languages, and cultures of First Nations, Métis, Inuit, and all First Peoples of Canada, whose presence continues to enrich our vibrant community.



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We would like to acknowledge that we are located on treaty 6,7, and 8 territories and we respect the histories, languages and cultures of first nations, Metis and Inuit and all first peoples of Canada whose presence continues to enrich our vibrant community. I would like you to put in the chat where you are from or where you are working from today.

Disclosures

The Palliative Care Public Awareness project is funded by the Government of Alberta. The views expressed herein do not necessarily represent the views of the Government of Alberta.



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Reminders

- This session is being recorded.
- Please do not disclose any personal health information during the session.
- Your microphones are muted. When we invite participation, please unmute yourself if you'd like to speak at that time.
- If you experience technical difficulties, please let us know in the chat.



Learning Objectives

By the end of the session, participants will be able to:

Understand the importance of advance care planning

Learn to effectively deliver public education sessions on advance care planning utilizing the Plan Ahead toolkit

Gain insights from organizational experiences with the Plan Ahead Toolkit



BY





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Empowering Organizations with the Plan Ahead Toolkit



Presented by: Ellen Mi
Palliative Institute, Covenant Health
Date: September 9th

Presentation Overview

- The importance of advance care planning
- Empowering & supporting Albertans to advance care plan
- Organizational experiences with the Plan Ahead Toolkit





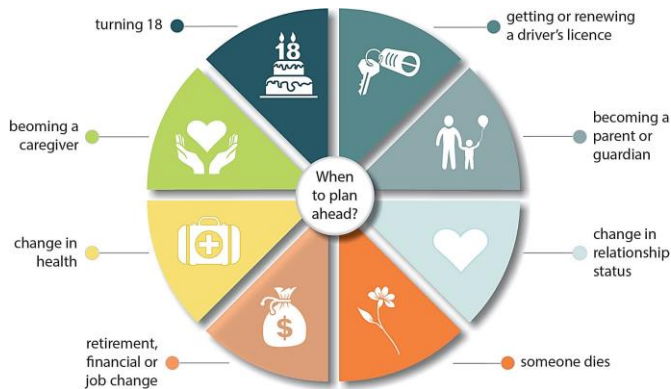
The Importance of Advance Care Planning



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What is advance care planning?



Advance care planning is thinking about, talking about, and documenting the health and personal care you want now and in the future.

Advance care planning is important for every adult at any stage of life. It is best done when you are healthy, before there is an urgent need for it. Milestone moments are an especially good time to start advance care planning.

Why is advance care planning important?

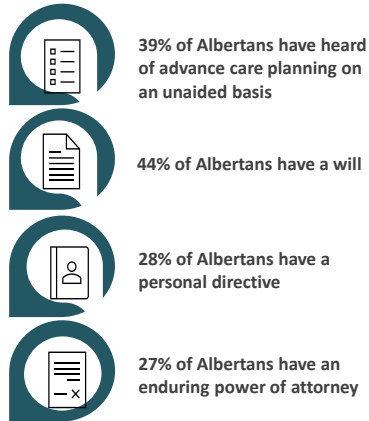
- Encourages people to take control of their care decisions
- Reduces stress and conflict during decision-making
- Provides peace of mind by planning ahead



Advance care planning, is an important aspect for everyone at any age, as noted in the previous slide, and it is especially important for patients who are in palliative or end-of-life care. It has shown to preserve patient wishes for care, reduces conflict and burden on loved ones, and can help improve quality of life for patients.

If you get sick or injured and cannot speak for yourself, advance care planning prepares you and others to make important decisions about your care. Thinking about what matters to you in advance can make a difficult time a bit easier for you and the people close to you. It encourages people to take control of their care decisions and provides a peace of mind by preparing and planning ahead.

Awareness around Advance Care Planning



Covenant Health Palliative Institute. Albertans' Views on Advance Care Planning & Palliative Care: Public Poll Report. May 6, 2024.

Low public awareness of advance care planning constitutes a major barrier to the uptake of advance care planning initiatives. Low awareness of, and engagement in, advance care planning can result in individuals and families being unprepared for dealing with illness or injuries.

In March 2024, the Covenant Health Palliative Institute commissioned Ipsos Canada to conduct a public poll of Albertans to:

1. collect data on Albertans' awareness of palliative care and advance care planning;
2. gather data around awareness of the concept of compassionate communities;
3. inform future work by better understanding how and where Albertans would like to receive information about palliative care and advance care planning.

Here are some of the results of this public poll:

- 39% of Albertans have heard of advance care planning on an unaided basis.
 - With the benefit of a definition, awareness rises to 69% of Albertans.
 - Awareness has been increasing over the past 10 years, with awareness at 26% in 2013 and 31% in 2019, which is a positive sign.
- 44% of Albertans have a will
- 28% of Albertans a personal directive

- 27% of Albertans have an enduring power

Even though there is an increasing number of Albertans who are aware of advance care planning, most Albertans do not have personal planning documents ready.

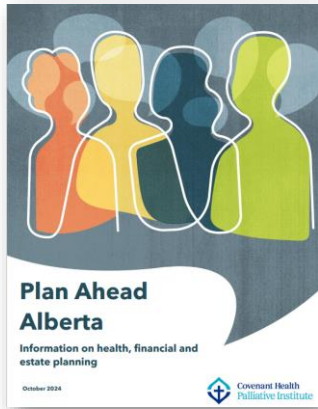


Empowering & Supporting Albertans to Advance Care Plan



In this section of this presentation, we will go through the ways in which organizations that serve the community can engage and support Albertans in advance care planning.

Hosting educational sessions with the *Plan Ahead Toolkit*



The *Plan Ahead Toolkit*:

- Contains Alberta-specific information on advance care planning.
- Provides tips for facilitators on running public education initiatives on these topics.
- Includes resources to support public awareness and further education.

Over the past 2 years. We've developed and enhanced the Plan Ahead Toolkit for community organizations, groups, to help empower Albertans to think about advance care planning and take the necessary steps to complete the essential documents of personal directive, enduring power of attorney, and will. This toolkit includes Alberta-specific information on health, financial and estate planning, as well the key three documents.

We're hopeful organizations can take this toolkit and run sessions for their diverse and vibrant communities so that everyone has access to advance care planning education. We know there isn't a one size fits all solution to learning so with different organizations facilitating ACP education, using this toolkit, gives them the ability tailor resources and information to different groups.

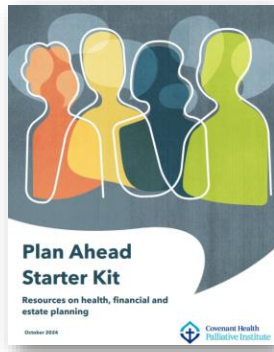
Toolkit includes supporting material



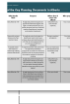
Our updated Plan Ahead Toolkit includes the following components:

- **The Plan Ahead Alberta:** which houses all the plan ahead content for facilitators
- **The Facilitator Guide:** which houses tips, checklists, and suggestions for facilitators to use when running education sessions. Comes with evaluation surveys for facilitators and participants.
- **The Starter Kit:** The Plan Ahead Starter Kit is for session attendees to take home with them after a session. It summarizes the key points from the presentation and provides Alberta-specific legal resources and services to help people prepare these important documents.
- **Plan Ahead Slide Deck:** This is an adaptable slide deck for facilitators to use during education sessions. It includes speaker notes and is a ready to go resource for facilitators.

Plan Ahead Starter Kit



ACP Checklist



Overview of the Key Planning Documents in Alberta



Resources for preparing your legal documents



Government of Alberta Personal Directive Template



My Wishes Alberta Workbook



CPLEA's Planning for the Future



Government of Alberta Personal Directive Instruction Sheet



Planning Ahead Checklist



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This slide introduces the Plan Ahead Starter Kit, a comprehensive resource designed to help Albertans navigate health, financial, and estate planning.

The Contents of the Starter Kit include these 8 components which are shown on the right hand side:

ACP Checklist –A checklist that summarizes the 5 steps of advance care planning.

My Wishes Alberta Workbook – A personalized tool for documenting values, wishes, and preferences.

Overview of the Key Planning Documents in Alberta – Provides clarity on what documents are needed and their purposes. Like for example, the purposes of each document and when they come into effect.

CPLEA's Planning for the Future – Information and summary of the 3 important documents and other Legal education resources from the Centre for Public Legal Education Alberta.

Resources for Preparing Your Legal Documents – A document that helps users understand and prepare necessary legal paperwork and services available in Alberta.

Government of Alberta Personal Directive Instruction Sheet – Step-by-step instructions for creating a personal directive.

Government of Alberta Personal Directive Template – A ready-to-use form for

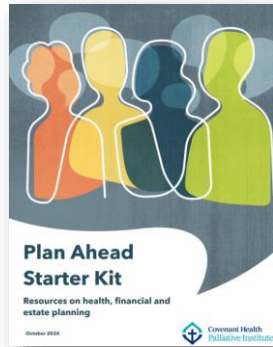
drafting a directive.

Planning Ahead Checklist – A final checklist to ensure all aspects of planning are covered.

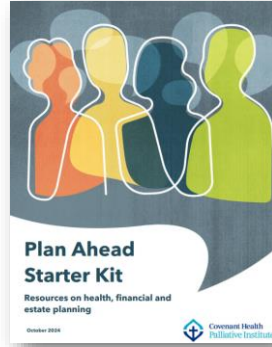
Plan Ahead Starter Kit Translations



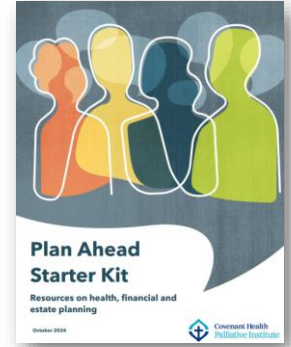
French



Spanish



Arabic



Punjabi



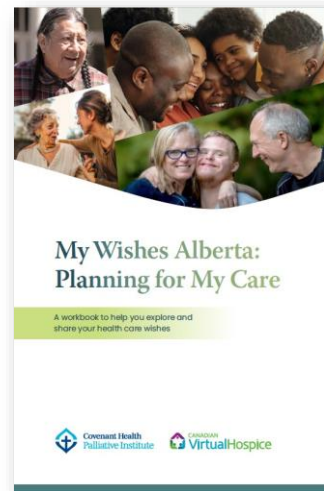
We're excited to share that the Covenant Health Palliative Institute is currently working on translated versions of the Plan Ahead Starter Kit.

These translations are being developed in French, Spanish, Arabic, and Punjabi, reflecting our commitment to accessibility and inclusivity. This initiative builds on the success of our My Wishes Alberta workbook translations, which helped reach a wider audience across Alberta. Just like those workbooks, the translated Starter Kits will support individuals and families in making informed decisions about their health, financial, and estate planning—in the language they're most comfortable with.

Please stay tuned for more updates about the launch of these new translated resources!

My Wishes Alberta

- Fillable workbook that guides people to identify what is most important to them in their life, health and personal care.
- Prepares people to have conversations and make decisions about their care.
- Does not replace formal advance care planning documents.
- Adapted from *Coming Full Circle* in collaboration with the Canadian Virtual Hospice and a national Circle of Elders and Knowledge Carriers.



The My Wishes Alberta Workbook:

- Is a fillable workbook that guides people to identify what is most important to them in their life, health and personal care.
- Prepares people to have conversations and make decisions about their care.
- Does not replace formal advance care planning documents.
- Adapted from *Coming Full Circle* in collaboration with the Canadian Virtual Hospice and a national Circle of Elders and Knowledge Carriers. It was also informed by the advice of an Alberta working group.

My Wishes Alberta

Thinking about your wishes for care

Next, think about your wishes for your care and what you value the most. How would you like your physical, emotional, social, and spiritual needs met?

If you were to get very sick, what would matter the most to you?

(For example: being able to spend time with your family and friends, being in your own home, having people around you who speak your language, being pain-free, being treated with dignity)

If you were to get very sick, what would you be most worried about?

(For example: being in pain, being alone, needing to leave your home or community to receive care, that the people you care for are looked after, finances)



What would you want your care providers to know about you as a person so that they could give you the best possible care?

"I follow a traditional lifestyle and that would be part of my expectations in my care – that it would be incorporated into Western medical interventions. That might mean plant medicines, teas, or even ceremonies in a medical context. I would want my health care providers to support this."

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- Contains four sections:

1. What matters most to you?
2. Thinking about your wishes for care
3. Talking about your wishes
4. Making sure your wishes are honoured

- Plus: Additional resources



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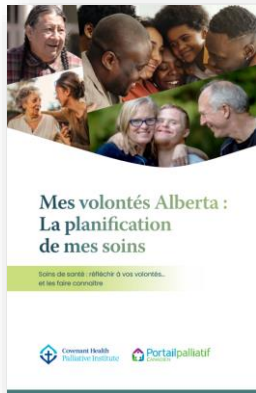
My Wishes Alberta contains four sections:

1. What matters most to you?
2. Thinking about your wishes for care
3. Talking about your wishes and
4. Making sure your wishes are honoured

It also includes links to additional resources on advance care planning.

The main focus of *My Wishes Alberta* is on the THINK step of advance care planning. It's designed to guide people through this by providing thought-provoking questions and space for people to record their thoughts. It also prompts people to use the workbook to start the TALK step: sharing their wishes with the people close to them and their health care providers, and information about personal directives.

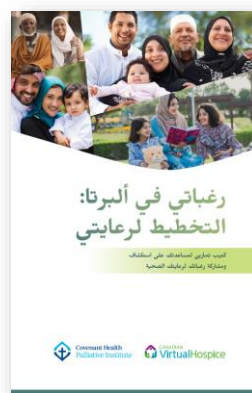
My Wishes Alberta Translations



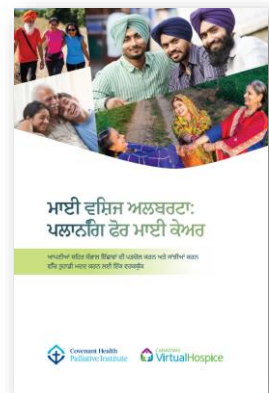
French



Spanish



Arabic



Punjabi



As mentioned earlier, we initially translated our My Wishes Alberta Workbook into the 4 languages of French, Spanish, Arabic, and Punjabi, which helped reach a wider audience across Alberta. These are currently available online on our Compassionate Alberta website (<https://covenanthealth.ca/about/centres-and-institutes/palliative-institute/compassionate-alberta/plan-ahead#my-wishes-alberta-workbook>)



Compassionate Alberta

(covenanthealth.ca) has in-depth information on health and personal, financial and legal planning and other topics.

- Repository of workbooks, games, conversation starters to support initiatives.
- Links to other trusted sources of health and legal information (e.g., Alberta Health Services, MyHealthAlberta, Government of Alberta).



Our Compassionate Alberta section on our Covenant Health Palliative Institute website provides information for the public and for community organizations. As you can see on the right here, our website has four areas of focus: planning ahead (which includes advance care planning), learning about palliative care, building community support and talking about death and dying. Each of these sections has its own directory of tools of workbooks, games, conversation starters and other resources that has been intentionally curated to be relevant to Alberta.

You may wish to access this information or share it with your clients and community members.

Medical emergencies happen. Health changes. Planning ahead can make life a little easier and give you a say in your care. This section will help you do this.

Health planning

- [Advance care planning](#)
- [Supported decision-making](#)
- [Organ and tissue donation in Alberta](#)

Financial, estate and funeral planning

- [Enduring power of attorney](#)
- [Wills](#)
- [Funeral planning](#)

What next?

- [My Wish\(es\) Alberta workbook](#)
- [Conversation starters and games](#)
- [Get legal assistance](#)
- [Find a doctor or lawyer](#)

Plan Ahead toolkit for organizations

Are you or your organization interested in running initiatives to help members of your community plan ahead?

The Plan Ahead toolkit provides information on health, financial and estate planning in Alberta. It also provides guidance on running successful community initiatives on these topics.

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

Plan Ahead toolkit

Is your organization interested in running initiatives to help members of your community plan ahead?

The Plan Ahead toolkit contains information on health, financial and estate planning in Alberta. It also provides guidance on running successful community initiatives on these topics.

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

Contents

The Plan Ahead toolkit includes:

- Plan Ahead Alberta** - Information on health, financial and estate planning specific to Alberta
- Facilitator guide** - Tips and resources for facilitators of Plan Ahead education sessions
- Plan Ahead presentation** - An adaptable slide deck
- Plan Ahead starter kit** - Resources to help session participants begin or take next steps with their health, financial and estate planning


The **My Wish(es) Alberta workbook** is included in the Plan Ahead starter kit, but you may also order **professionally printed copies**.


More resources

[Advance care planning page](#) - Contains eight questions on advance care planning.

Publications Institute

- Private
- Resources
- People and communities
- Healthcare providers
- Researchers
- Compassionate Alberta
- Plan ahead
- Learn about palliative care
- Build community support
- Talk about death and dying
- Order our resources
- News and events
- Palliative Care Education and Research Conference
- EOHC info
- In the news
- Publications
- About
- Contact





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The Plan Ahead Toolkit is currently on our Compassionate Alberta website, which is nestled in the covenant health palliative institute website. It can be found towards the end of the plan ahead section.



Organizational Experiences with the Plan Ahead Toolkit



In this section of the presentation, we'll explore how community-serving organizations can actively engage and support Albertans in their advance care planning journey by hearing about other organizations have used or are planning to use the Plan Ahead Toolkit.

Organizational Experiences with the Plan Ahead Toolkit



Vineeta Kapoor
Manager of Seniors Supports & Volunteers
Unison at Kerby Centre



To begin, we will have Vineeta Kapoor from Unison, at the Kerby Centre in Calgary, speak about her experiences using the Plan Ahead Toolkit for seniors in her community.

Vineeta's sharing:

I believe the Plan Ahead Toolkit aligns perfectly with our mission to help older adults live well in their communities. It provides clear, easy-to-understand guidance on important topics like wills, power of attorney, personal directives, and expressing personal wishes—areas that are often overlooked but deeply impactful as people age. What stands out is how the toolkit empowers seniors to make informed decisions, supporting their independence and dignity—core values of our work. Its inclusive approach and warm, respectful tone reflect our commitment to honoring the aging journey.

Although we haven't introduced the toolkit to our clients yet, we're preparing for our first educational session on September 18. This will be a friendly introduction to the toolkit and its key topics. We expect it to be a helpful way to get seniors thinking about and planning for their future. Looking ahead, we plan to offer quarterly sessions that are interactive and informative, using the toolkit as our main guide. We also aim to

include caregivers and family members, recognizing their vital role in supporting aging loved ones.

Our sessions will feature a mix of presentations, printed handouts, and group discussions to keep things accessible and engaging. One major advantage is that the toolkit is available in multiple languages, especially the *My Wishes* section, which is a big plus for us at Unison, given our diverse community. This ensures more people can understand and benefit from the information, regardless of language.

The facilitator package is another valuable resource—it provides clear guidance, talking points, and session outlines, making it easier to deliver consistent and meaningful sessions. The slide deck, complete with speaker notes and customizable content, is also incredibly useful.

Overall, the toolkit is a great way to start important conversations. Its clear, approachable language makes sensitive topics easier to discuss, and its multilingual availability helps us reach clients from various backgrounds. From what I've seen, it offers a solid overview of legal documents, healthcare decisions, and available services, helping clients feel more confident and informed.

To answer your last question—yes, the toolkit is both user-friendly and effective. Its thoughtful design and practical resources will help us run engaging, informative sessions that truly support our clients.

Organizational Experiences with the Plan Ahead Toolkit



Naxhielli Donaji Mendez Muniz
Volunteer, Vaccine Navigators' Team
AIMGA



Now, I'd like to invite Naxhielli Donaj Mendez Muniz from AIMGA—the Alberta International Medical Graduates Association—to share her experiences using the Plan Ahead Toolkit.

Naxhielli's Sharing:

Our organization supports newcomers in understanding and navigating the Alberta Health System, especially when they've just arrived. We help explain key differences between healthcare in their home countries and in Alberta. The Plan Ahead Toolkit has been an excellent resource for introducing important decisions they may face in Canada and encouraging proactive planning. The *My Wishes* booklet, in particular, has been very effective—it gives participants something tangible to take home and helps spark meaningful conversations with their families.

Given our multicultural team and diverse client base, we began by hosting two internal presentations—one with our navigators and another with all staff. These sessions helped us identify potential cultural challenges and adjust our vocabulary and approach to better suit our audiences. We then held two more sessions with partner organizations, including one focused on seniors. That session highlighted the need for support persons, as many participants required help navigating paperwork. We provided live translation in Dari, Hindi, and Punjabi, and allowed time for one-on-

one conversations afterward, which proved very fruitful. Participants especially appreciated having printed materials to take home and discuss with their families.

In terms of raising awareness, we were surprised to find that even many middle-aged staff hadn't considered the importance of these conversations. After the sessions, participants expressed gratitude for the opportunity and were eager to share what they learned with family and friends. Newcomers were particularly surprised but receptive, recognizing the value of starting these discussions early.

Regarding usability and effectiveness, we appreciated the flexibility to tailor materials to our audience. The *My Wishes Alberta* workbook was especially well-received for its conversation prompts. The ACP checklist was a helpful guide for facilitators to walk through key documents, and we shared relevant links and local resources, including those from *My Alberta Health*. Overall, the toolkit was easy to use and highly effective in helping us deliver meaningful, culturally sensitive sessions.

Thank you!

Contact us:

Ellen.Mi@covenanthealth.ca



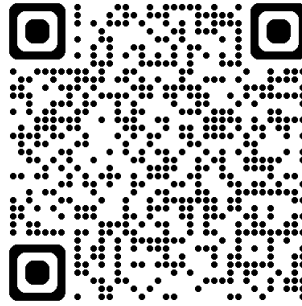
General email:

Palliative.Institute@covenanthealth.ca



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Evaluation



<https://redcap.link/PATECHOSession>



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I would like to thank our guest speakers, Vineeta and Naxhielli, for this great session, as well as thank all of you for your engagement and participation.

We really appreciate your perspective and feedback. We have added a link to an evaluation survey in the chat and will be also included in our follow up email. Please take a moment to complete the survey of this session.

Stay Connected



- Visit [Compassionate Alberta \(covenanthealth.ca\)](https://covenanthealth.ca) to access all our tools and resources.
- Please subscribe to our newsletter: [Palliative Institute | Compassionate Alberta newsletter](#)
- Contact us at: Palliative.Institute@covenanthealth.ca



Pallium Canada

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If you would like to receive updates on Palliative Institute news and events, please subscribe to our newsletter. For more updates, please follow us on social media. We are on LinkedIn, Facebook, X, and BlueSky. We will include the links to our channels in our follow-up email. We invite you to visit our website [compassionate Alberta](https://covenanthealth.ca) to know more about our tools.

Thank You!

The Palliative Care ECHO Project is supported by a financial contribution from Health Canada. The views expressed herein do not necessarily represent the views of Health Canada.



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We would like to acknowledge the financial contribution made by Health Canada towards the Palliative Care ECHO project.

Thank you for attending and have a wonderful afternoon.