



# How to Facilitate In-Person and Online Group Sessions for Care Partners

## A Toolkit for Facilitators' Use

PREPARE for **THEIR** Care supports care partners (family or friends) who help other people with their medical planning and medical decisions. You can help care partners by hosting Group Sessions.



We make it easy by providing **checklists**, **words you can say (scripts)**, and **easy-to-use videos** that show participants all the information they need, answers to frequently asked questions (FAQs).

## YOU DO NOT NEED TO BE AN EXPERT

For more information visit: [www.PREPAREforYourCare.org](http://www.PREPAREforYourCare.org)

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# Welcome Letter to Facilitators

Dear Community Leader,

Thank you for considering hosting a **PREPARE for THEIR Care** Group Session.

The **PREPARE for THEIR Care** program is designed to support care partners (family or friends) as they help other people with their medical planning (sometimes called advance care planning) and/or make medical decisions for others.

This Toolkit will help you put on an in-person or online (virtual) **PREPARE for THEIR Care** Group Session. The Sessions are presentations to a group of people who will watch the **PREPARE for THEIR Care** videos (in-person or online) and follow along with the printed Program Guides. We make it easy by providing special symbols that indicate specific information for in-person or online sessions.

Look for the following symbol that indicates specific information about **IN-PERSON** sessions:



Look for the following symbol that indicates specific information about **ONLINE** sessions:



It is OK if these topics are new to you. **You do not need to be an expert!**


This Toolkit is a **step-by-step guide**; all the information is provided for you on the **PREPARE for THEIR Care website and within the videos**.

We make it easy by providing checklists, words you can say (scripts), easy-to-use videos, printable program guides, and answers to frequently asked questions (FAQs). Playing the videos will give the group participants all the information they need.

Thank you for supporting care partners,

The PREPARE Team

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**Step 1**

**Learn**

## Chapter 1 About PREPARE for THEIR Care

In Chapter 1, you will learn specific terms that you will see throughout this Toolkit, and you will get general information on the PREPARE for **THEIR** Care program, website, videos, and an overview of this Toolkit.

On **Pages 4 to 6**, you will find the following information:

### Step 1

### Learn

- [What is Medical Planning](#), **Page 4**
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## What is Medical Planning?

**Medical Planning** helps people have a voice in their health care. Sometimes, medical planning is also called advance care planning.

Medical planning allows people to:

- **Name a trusted medical decision maker** in case of an emergency.
- **Tell their medical decision maker(s) and medical care team what is most important** for their quality of life and healthcare.
- **Write down the name of their medical decision maker and medical wishes** on an advance directive form.

## What is an Advance Directive?

For some people, medical planning includes filling out an advance directive. An **advance directive** is a legal form that allows people to have a say about how they want to be cared for if they cannot speak for themselves.

## What is the PREPARE for THEIR Care Program?

The **PREPARE for THEIR Care** program is designed to support care partners (family or friends) as they help other people with their medical planning (including advance directives) and medical decisions.

**PREPARE for THEIR Care** is part of the overarching PREPARE program. It can be found on the main [PREPAREforYourCare.org](https://PREPAREforYourCare.org) homepage. It has two parts: “**How to Help Other People with Their Medical Planning**” and “**How to Make Medical Decisions for Other People**.”

This Toolkit will help you put on Group Sessions, which are presentations to a group of people who will watch the program videos (in-person or online).

## Where to Find Materials for Groups

**PREPARE for THEIR Care** can be found on the main [PREPAREforYourCare.org](https://PREPAREforYourCare.org) webpage, as seen in **Image 1**.

This main page has other resources for people to do their own medical planning, tools for providers and organizations, and free and easy-to-read advance directives for all U.S. states in several languages.



**Image 1:** Main page of the **PREPARE** website.



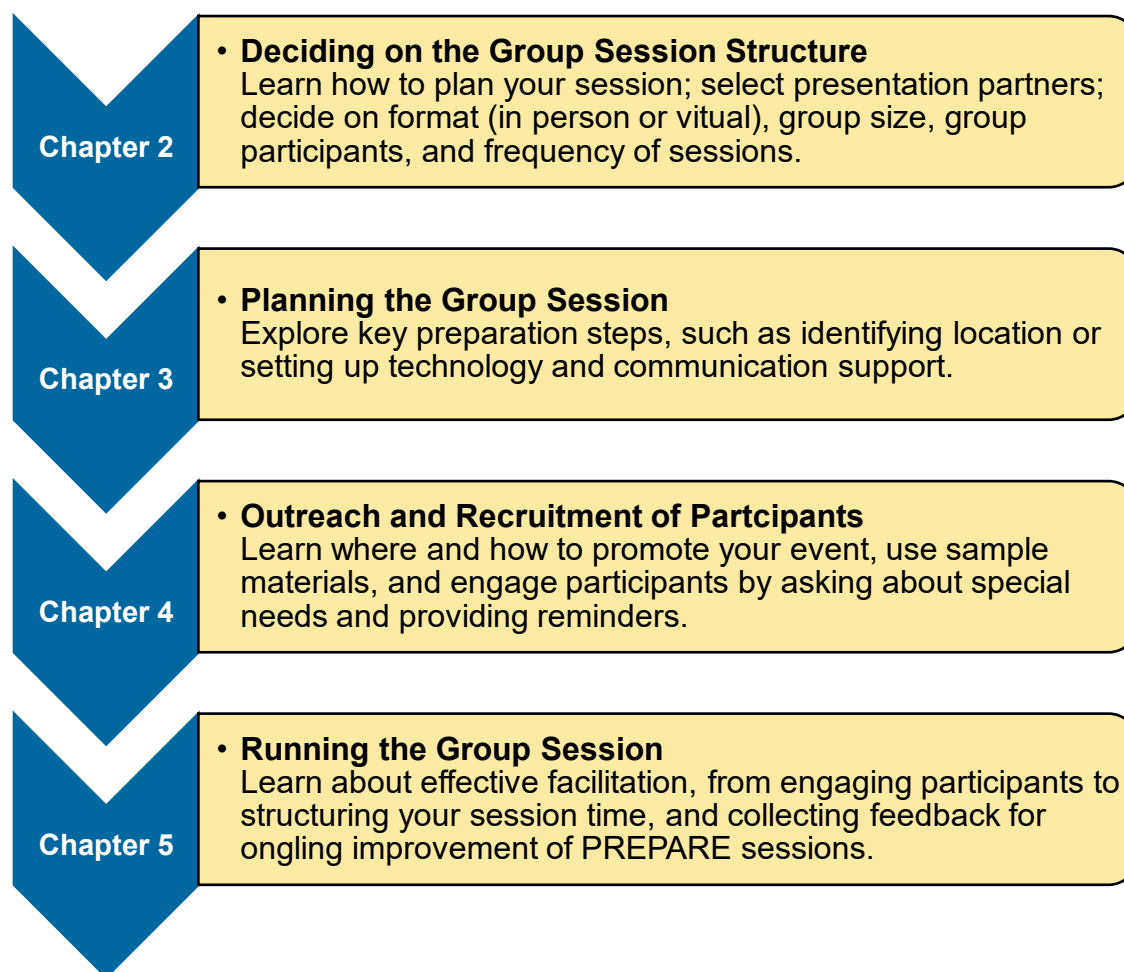
**Image 2:** Two parts of the **PREPARE for THEIR Care** program on the website

There are two parts of the program, as seen in **Image 2**:

- How to Help Other People with Their Medical Planning (**Part 1**)
- How to Make Medical Decisions for Other People (**Part 2**)

## Overview of Toolkit and Steps to Put on Group Sessions

This Toolkit is a step-by-step guide that will provide you with the information to put on the **PREPARE for THEIR Care** Group Session, see the **Figure 1** below. Each chapter in this Toolkit will go into more detail.



**Figure 1:** Steps to putting on and facilitating a **PREPARE for THEIR Care** in-person or online Group Session



# Plan



## Chapter 2 Deciding on the Group Structure

In Chapter 2, you will learn how to plan your session, select presentation partners, and decide on format (in-person or online), group size, group participants, and frequency of sessions.

On **Pages 8 to 14**, you will find the following information:

### Step 2

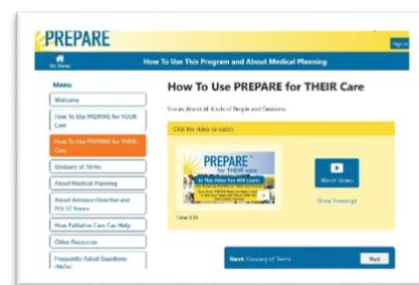
### Plan

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- [Decide on Group Size](#), **Page 12**
- [Decide on Group Participants \(Audience\)](#), **Page 13**
- [Decide on Timing and Frequency of Group](#), **Page 14**

## Get Familiar with the Program and Tools

Go to [PREPAREforTheirCare.org](https://PREPAREforTheirCare.org) website. Click on “How to Use PREPARE for THEIR Care” (looks like **Image 3**). Watch “How to Use This PREPARE for THEIR Care” to learn:

- About the **PREPARE for THEIR Care** program
- About the more extensive PREPARE Program and other important resources (i.e., **PREPARE for YOUR Care**)
- How to navigate the **PREPARE for THEIR Care** website
- How to select which videos to play
- How to use the Program Guides to help follow along with the videos



**Image 3:** “How to Use PREPARE for THEIR Care” on website

Please also watch the videos from **(Part 1) “How To Help Other People With Their Medical Planning”** and **(Part 2) “How To Make Medical Decisions for Other People”** to familiarize yourself with the material. This will help you decide which videos are right for your Group Session(s).

## Decide on Which Videos to Show the Group

There are two parts to the **PREPARE for THEIR Care** program, with videos that you can show to support care partners. This will depend upon your audience.

- How To Help Other People With Their Medical Planning (**Part 1**)
- How To Make Medical Decisions for Other People (**Part 2**)

Depending on the part of the program you choose, you will show different videos. Depending on your audience, you can select videos in **Part 1**, **Part 2**, or **both**. See **Table 1** below to help you decide which part of the program would be most appropriate.

**Table 1. Differences between the two parts to the PREPARE for THEIR Care program**

	How to Help Other People With Their Medical Planning (Part 1)	How to Help Make Medical Decisions People for Other People (Part 2)
<b>Description:</b>	<b>Part 1</b> will help support care partners (family and friends) in helping other people with their medical planning.	<b>Part 2</b> will help support partners (family and friends) in making medical decisions for other people.
<b>Focus:</b>	For care partners of people <b>who can still speak for themselves and make their own medical decisions.</b>	For care partners of <b>people who cannot, or do not want to, speak for themselves or make their own medical decisions.</b>
<b>Goal:</b>	To help ensure people have the opportunity to <b>have a voice</b> in their health care and complete care planning.	To ensure the medical decisions made <b>align with the individual's values, preferences, and overall goals for their quality of life.</b>
<b>Audience:</b>	<ul style="list-style-type: none"> <li>• People who would like to <b>bring up the topic</b> of medical planning with their loved ones</li> <li>• People who want to <b>help someone else</b> with their medical planning and advance directives</li> <li>• People who <b>may have to make medical decisions for other people</b> in the future</li> </ul>	<ul style="list-style-type: none"> <li>• Care partners who are <b>making medical decisions</b> for someone else</li> <li>• People who would like to <b>prepare to be someone's medical decision maker</b></li> <li>• People who would like to <b>prepare to make medical decisions for other people</b> in the future</li> </ul>

	How to Help Other People With Their Medical Planning (Part 1)	How to Help Make Medical Decisions People for Other People (Part 2)
<b>Delivery mode:</b>	<ul style="list-style-type: none"> <li>• In-person small Group Session</li> <li>• Online small Group Session`</li> </ul>	<ul style="list-style-type: none"> <li>• In-person small Group Session</li> <li>• Online small Group Session</li> </ul>
<b>Number of videos:</b>	4 key and 2 bonus videos	4 key and 3 bonus videos
<b>Videos (video times are approximate):</b>	<ul style="list-style-type: none"> <li>• Important Ways Planning is Different for Each Person (~5 minutes)</li> <li>• How to Bring Up the Topic of Medical Planning With Your Family and Friends (~7 minutes)</li> <li>• How To Ask Other People About Their Medical Wishes and Medical Planning (~7 minutes)</li> <li>• How To Help Other People Write Down Their Medical Wishes on an Advance Directive Legal Form (~5 minutes)</li> <li>• <b>BONUS:</b> What To Say if You Learn You Are Not the Decision Maker (~3 minutes)</li> <li>• <b>BONUS:</b> What to Say if You Do Not Want To Be the Decision Maker (~1 minute)</li> </ul>	<ul style="list-style-type: none"> <li>• How to Ask the Medical Care Team Questions (~9 minutes)</li> <li>• How To Make Medical Decisions for Other People (~12 minutes)</li> <li>• How To Talk About Decisions You Made for Others (~10 minutes)</li> <li>• Advice From Other Medical Decision Makers (~7 minutes)</li> <li>• <b>BONUS:</b> How To Help Even if You Are Not the Decision Maker (~4 minutes)</li> <li>• <b>BONUS:</b> How to Ask Someone Else to Be the Decision Maker (~2 minutes)</li> <li>• <b>BONUS:</b> What To Do When Families Do Not Agree (~6 minutes)</li> </ul>
<b>Handouts:</b>	<p>Distribute at the <b>START</b> of the session:</p> <ul style="list-style-type: none"> <li>• How To Help Other People With Their Medical Planning Guide</li> </ul> <p>Distribute at the <b>END</b> of the session:</p> <ul style="list-style-type: none"> <li>• How To Make Medical Decisions for Other People Guide [Optional]</li> <li>• <b>PREPARE for YOUR Care</b> Pamphlet</li> <li>• Easy-to-Read Advance Directive</li> </ul>	<p>Distribute at the <b>START</b> of the session:)</p> <ul style="list-style-type: none"> <li>• How To Make Medical Decisions for Other People Guide</li> </ul> <p>Distribute at the <b>END</b> of the session:</p> <ul style="list-style-type: none"> <li>• How To Help Other People With Their Medical Planning Guide [Optional]</li> <li>• <b>PREPARE for YOUR Care</b> Pamphlet</li> <li>• Easy-to-Read Advance Directive</li> </ul>

## Decide Who Will Facilitate the Group

You will need to decide on who will facilitate (or teach) the Group Session.

We recommend that every session have at least two facilitators. Select co-facilitators willing to conduct the sessions at the location or on a preferred day or time.



**For In-Person Sessions:** The second facilitator can help with the logistics of setting up the room.



**For Online Sessions:** The second facilitator can help with technology support for participants. Select someone who has experience facilitating the use of technology, is familiar with it, and has access to the required technology (a computer or laptop, internet connection).

It is best to have facilitators who come from similar communities as those participating in the Group Session when possible. This may include a person with lived experience with the health condition of focus, caregiving responsibilities, geography, race, ethnicity, language, religion, etc.

Once you select your facilitators or co-facilitators, familiarize them with the **PREPARE for THEIR Care** program and this Toolkit.



**Note:** It may be helpful to share the **PREPARE for THEIR Care** website and this Toolkit with potential facilitators to help them decide whether to lead the Group Sessions and get their questions answered ahead of time.

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## Decide on the Group Format: In-person or Online

The program can be delivered in two different **group formats** (or **delivery modes**): in-person or online. You cannot always predict what format people will prefer. Therefore, when recruiting people, find out which format they prefer. **Table 2** shows some considerations for each format.

Table 2. Advantages and Disadvantages for In-person and Online Groups

 In-person Groups	
Advantages	Disadvantages
<ul style="list-style-type: none"> <li>+ Brings people together at a central location</li> <li>+ People can learn from each other</li> <li>+ Maybe what people expect</li> </ul>	<ul style="list-style-type: none"> <li>✗ Not all people like to meet in groups</li> <li>✗ Excludes homebound peoples</li> <li>✗ Travel time, distance, parking</li> <li>✗ Expense</li> <li>✗ Recruitment may be more difficult</li> </ul>
 Online Groups (Using a Video Conferencing Platform Such as Zoom)	
Advantages	Disadvantages
<ul style="list-style-type: none"> <li>+ Expands the catchment area for Group Sessions</li> <li>+ Allows people who are homebound to attend</li> <li>+ Recruitment may be easier</li> <li>+ Time commitment is reduced since no travel time is required</li> <li>+ Might improve attendance and retention rates for anyone concerned about congregating</li> </ul>	<ul style="list-style-type: none"> <li>✗ Not as personal as In-person Sessions</li> <li>✗ Does not allow for socialization before, during, or after the sessions</li> <li>✗ Excludes those who do not have computer and internet access</li> <li>✗ Excludes those who prefer not to use virtual platforms</li> <li>✗ May require extra technical support for the facilitators and participants May require a paid subscription to the teleconferencing platform</li> <li>✗ May require a paid subscription to the teleconferencing platform</li> </ul>

## Decide on the Group Size

For in-person and online Group Sessions, we recommend **groups of 4-8, with at most 12 people**.

Having small groups helps to create intimacy and connection among participants and comfort in opening up with other group members.

However, we never want to turn anyone away who wants to learn. For example, we have had online sessions with as many as 50 people. If interest is high and you must include more people per group, consider recruiting additional facilitators to help with the session.

## Decide on Group Participants (Audience)

**PREPARE for THEIR Care** Group Sessions can be tailored to meet the needs of any audience. You may not know or have a say in your audience before a Group Session. This is OK. You can ask participants about their experience and decide at the time which videos and content would meet most of the participants' needs.

You may also decide to recruit specific types of participants. For example, it can be helpful to decide ahead of time whether to include care partners and their family/friends, to include people who only want to see videos for “How to Help Other People with Medical Planning” (**Part 1**), or only from “How to Make Medical Decisions for Other People” (**Part 2**), or people caring for those with specific disease types (e.g., cancer). In **Table 3** there are some things to consider when deciding on your participants.

**Table 3. Considerations for Deciding on Group Participants**

Considerations	Suggested participants
<b>Participant type</b>	<ul style="list-style-type: none"> <li>• Include only care partners.</li> <li>• Or, include both people and their care partners.</li> </ul>
<b>Decision-making stage of the people being cared for</b>	<ul style="list-style-type: none"> <li>• Only include care partners of people who can still make their own medical decisions. Use <b>Part 1</b> of the program.</li> <li>• Only caregivers of people who cannot make their own decisions. Use <b>Part 2</b> of the program.</li> <li>• Or both. Use both <b>Part 1</b> and <b>Part 2</b> of the program.</li> </ul>
<b>Focus on a specific disease</b>	<ul style="list-style-type: none"> <li>• The group can include care partners of people who have different diseases.</li> <li>• Or, you can decide only to include people caring for those with a specific disease (e.g., dementia, cancer).</li> </ul>
<b>Show videos from Part 1, Part 2, or both</b>	<ul style="list-style-type: none"> <li>• If it is a new group, materials will depend on the interest, participant type, and disease stage. Use both <b>Part 1</b> and <b>Part 2</b> of the program.</li> <li>• If it is a long-standing group, you can ask members what topics they are most interested in and tailor to their needs.</li> </ul>

## Decide on Timing and Frequency of Group

Once you have decided on the part(s) of the program and the total number of videos you will show, it's time to figure out how frequently your group will meet. This will help establish expectations for participants when you are ready to promote the event.

**In considering how many times the group will meet, we recommend:**

- **Consider your and the participants' time commitment.** Most care partners may have difficulty carving out more than one hour daily. In addition, think about how often you can personally commit to facilitating.
  - *We recommend sessions be at most 60 to 90 minutes.*
- **Ask about Group Preference.** In the first session, you can ask participants how often they want to meet and which videos they prefer to watch based on their goals and availability.
- **Balance videos with discussion.** Spend up to ~30-50 % of your group time showing videos to prevent boredom and facilitate discussion.
  - *For example, if you choose a one-hour duration for your session, spend at most 20 to 30 minutes showing videos.*
- **Show up to 2 to 4 videos per Group Session.** You should be able to show 2 to 4 videos and leave time for discussion. Focus and retention can be a challenge for participants when presenting too much information at once, especially with what can potentially be an emotionally heavy topic.
  - *If there are people in the audience with cognitive impairment or hard of hearing, we recommend showing no more than one video at a time and pausing the video more often to allow people to digest the information. Also, make sure that closed captioning is turned on the video.*

**If planning on more than one session:**

- **Have them weekly.** It is best to have weekly sessions, so group members remember the content.
- **Make sessions optional.** Let people know ahead of time what the session topic will be. Allow people to skip based on their schedule and interests.
- **Record the session.** Consider recording the session in case people need to miss it. Remember to ask attendees if they are OK with recording and sharing the session.

## Chapter 3 Planning the Group Session

Chapter 3 will teach you how to plan the in-person or online Group Session.

On **Pages 15 to 32**, you will find the following information on:

### Step 2

### Plan

- [Preparing for Your Group Session](#), **Page 15**
- [General Session Overview](#), **Page 19**
  - [Validated Questions to Ask Participants Before and After the Event](#), **Page 20**
  - [Feedback from Participants After the Event](#), **Page 29**
- [General Facilitation Tips](#), **Page 29**
- [Frequently Asked Questions \(FAQs\)](#), **Page 32**

## Preparing for Your Group Session

Now that you have learned more about the **PREPARE for THEIR Care** program and decided on your participants, it is time to plan the in-person or online Group Session.



### For In-Person Sessions: Preparing the Location

You need a location to host your in-person session.

- Please select a location, day, and time to hold the event. We recommend scheduling for 60 to 90 minutes.
- Reserve a meeting room for the event large enough with tables and chairs.
- When selecting a room, determine if you will have access to an internet connection (in some rooms, there may be a poor connection).
- Look around for a TV or a projector and presentation screen (a blank wall can also work) that you can use to share materials with participants. Determine if you will need a speaker or microphone to amplify the video volume or your voice.



Here are some other general thoughts about selecting a location for in-person sessions:

- Location must be accessible for people with disabilities; that is, they meet the Americans with Disabilities Act (ADA) standards (for example, parking near the entrance, wheelchair accessibility, elevators, etc.).
- Location must feel safe and have good lighting, especially outdoors, for evening sessions.
- Location near public transportation and/or good parking.
- Location is known to and frequented by potential participants.



### For Online Sessions: Preparing Video Conferencing Platform and Equipment

You need to decide on the number of sessions to host for online sessions.

- If you prefer and are able, decide on the number of sessions, videos to show during those sessions, and the length of those sessions. We recommend up to 60 minutes for online sessions.
- You may also decide on videos for the first session and ask the group about the videos they prefer to watch for subsequent sessions.
- Send calendar invites for online Group Sessions.

### Getting Your Tech Setup

Online video calls — or video conferencing platform — lets people see and talk to each other on their computers or devices. This section will cover what it takes to set up a videoconference, including choosing the right platform and understanding the essential features to make your online session successful.

The first step before you can videoconference is having a solid tech setup. You will want to test all the following beforehand to ensure they are working correctly:

- **A computer or laptop**
- **Strong, stable internet connection.** You can share your screen with participants and play the **PREPARE for THEIR Care** videos. An unstable internet connection may cause the video to freeze while playing. A good internet connection is needed to play the videos without interruption.
- **A webcam and microphone.** Sometimes, these are built into your computer or laptop. Sometimes, you may need to purchase them separately. Check the microphone for clear sound and set up good lighting for optimal camera performance (e.g., indirect light in front of you instead of behind you).

### Choosing a Videoconferencing Platform

As a facilitator, you can choose whichever videoconferencing platform you can access that works best for you.

Please review the videoconferencing platform you will be using. There are several platform options (e.g., Zoom, Microsoft Teams (MS Teams), Google Meet) Contact their support team if you need additional help (there are also many YouTube 'how to' videos online).

After reviewing the videoconferencing platform of your choice, we recommend using these helpful features to ensure a smooth session (if your platform supports it).

#### Highly Encouraged Features:

- **Enable Screenshare.** This is the most important function. You will want to present documents and videos during the session. You may decide to disable screen share abilities from other participants if possible.
- **Configure the Audio Source to your Device.** Configure your audio settings to come directly from your device (as opposed to picking up audio from your speakers). This will provide clear and synchronized sound for all participants and allow audio to be heard by participants.
- **Enable Raise Hand.** It allows participants to signal when they want to speak and promotes orderly discussions.
- **Enable Chat.** Allows participants to send instant messages to other users within a meeting or a private message to an individual participant. This is important as some individuals may feel uncomfortable asking a question verbally in the group.

#### Optional Features:

- **Enable/Disable Recording.** This can be valuable for participants who may need to review the content later. However, ALL group participants must verbally consent to be video or audio recorded before starting the recording.
- **Enable Mute All.** The option to mute all participants helps manage background noise and maintain focus during the session.
- **Enable Spotlight.** Check if the platform offers a spotlight feature, allowing you to highlight specific participants or screens for everyone to focus on, including your own.

- **Configure Meeting Access Management.** It is easiest to have the host set up the meeting so they have control of screen sharing, recording, etc. They can also join early. If your videoconferencing app allows it, you can configure meeting access management. This enables room access control, giving you space to join the meeting early and set up. Participants typically wait in a waiting room until you let them in.
- **Enable Polling.** If your platform allows, you can engage participants by posing questions and collecting real-time responses. This can help if you decide to ask participants pre- and post-questions or feedback about the session (see Step 4 of this Chapter for pre-post survey or Feedback Survey questions).
- **Enable Breakout Rooms.** If you have a large group and a facilitator for each potential breakout group and your video conferencing platform allows it, you can create breakout rooms for discussion. Breakout rooms allow you to split your session into smaller separate sessions. This will enable participants to participate in smaller group discussions.

### **Enlisting Technical Support**

We highly recommend having a technical support partner familiar with the chosen videoconferencing platform. This person can help you and your participants with technical issues during sessions, allowing you, as the primary facilitator, to concentrate on content delivery and participant engagement.

This person can also assist registered participants in technical orientations outside of Group Sessions, providing guidance on using the technology and addressing questions.

## General Session Overview

To give you an idea of what to expect when putting on a typical PREPARE in-person or online Group Session, we provide a general session overview. Each session is set up as follows:

**Step 1.** Introductions & Logistics

**Step 2.** Introduce the PREPARE Handouts

**Step 3.** Play the **PREPARE for THEIR Care** Videos

**Step 4:** Ask for Questions and/or Facilitate Group Discussions

**Step 5.** Wrapping up & Thank You

## Approximate time allocation for the Group Session

Depending on the session's delivery format or focus that you choose, we provide two tables to give you a sense of how much time to allocate to each session component (**Table 4** and **Table 5**). The times listed in the tables are approximate minutes per session component.

**Table 4. Time Allocation by Session Delivery Format**



Session delivery format	 In-person Session	 Online Session
Session component	Approximate time	Approximate time
<b>Step 1. Introductions &amp; Logistics</b> **Optional: Validated Questions before the event	15 minutes	15 minutes
<b>Step 2. Introduce the PREPARE Handouts</b>	5 minutes	5 minutes
<b>Step 3. Play the PREPARE for THEIR Care Videos</b>	20 minutes	20 minutes
<b>Step 4. Ask for Questions and/or Facilitate Group Discussions</b>	35 minutes	15 minutes
<b>Step 5. Wrapping up &amp; Thank You</b> **Optional: Validated Questions after the event **Optional: Feedback from Participants After the Event **Optional: After Session Office Hours	15 minutes	10 minutes
<b>Total time</b>	<b>~90 minutes</b>	<b>~60 minutes</b>

Table 5. Time Allocation by Session Focus

Session focus	How To Help Other People With Their Medical Planning (Part 1)	How To Help Make Medical Decisions for Other People (Part 2)
Session component	Approximate time	Approximate time
<b>Step 1. Introductions &amp; Logistics</b> **Optional: Validated Questions before the event	15 minutes	15 minutes
<b>Step 2. Introduce the PREPARE Handouts</b>	5 minutes	5 minutes
<b>Step 3. Play the PREPARE for <b>THEIR</b> Care Videos</b>	20 minutes	20 minutes
<b>Step 4. Ask for Questions and/or Facilitate Group Discussions</b>	15 minutes	35 minutes
<b>Step 5. Wrapping up &amp; Thank You</b> **Optional: Validated Questions after the event **Optional: Feedback from Participants After the Event **Optional: After Session Office Hours	10 minutes	15 minutes
<b>Total time</b>	<b>~60 minutes</b>	<b>~90 minutes</b>

## Step 1. Introductions & Logistics

Sessions begin by allowing participants to gather and build rapport. Using the scripts in [Chapter 5](#) of this Toolkit, you will begin the PREPARE Group Session by introducing yourself (optional group introductions) and the topic of focus for the session (**Part 1** or **Part 2**). Here, you may play a game for those who show up early, set ground rules, open to short Q&A, or recap the last session's notes (if applicable). At this time, you may want to have participants complete the optional validated questions.

### Optional: Validated Questions to Ask Participants Before the Event

In addition to measuring the number of people who attend your event, you may also like to assess whether the Group Sessions improve people's knowledge, attitudes, and readiness. We provide validated questions you can ask your participants at the beginning and end of your events.

See the **APPENDICES** for a copy of the validated questions. Instructions on how to score the responses can be found here: <https://prepareforyourcare.org/en/prepare/research/acp-engagement-survey>.



**For In-Person Sessions:** Asking participants validated questions during in-person sessions is easier because participants are present in the room. You can pass out the questions at the beginning and after the session.



**For Online Sessions:** Asking participants validated questions during an online session requires some more effort because participants are not in the room with you. Some options are calling participants before and after the session and asking them the questions over the telephone. Another option is to mail the validated questions before and after the session (make sure to include prepaid, pre-addressed envelopes for them to mail the questions back).

## Step 2. Introduce the PREPARE Handouts

Next, you will introduce the PREPARE handouts. Each participant will need a copy of the PREPARE handouts. You will use the script in [Chapter 5](#) of this Toolkit to explain each handout.



**For In-Person Sessions:** **Table 6** below lists both the handouts for Part 1 and Part 2 sessions and indicates when each handout should be provided during the session. We recommend assembling packets for each participant ahead of time. You can download the necessary materials (e.g., Program Guide, Pamphlet, Advance Directive, and Feedback Survey) from the PREPARE website.

**Table 6. Handouts for Group Sessions**

	To Help Other People With Their Medical Planning (Part 1)	How To Help Make Medical Decisions for Other People (Part 2)
Handouts to be given and reviewed at the START of the session:	<ul style="list-style-type: none"> <li>How To Help Other People With Their Medical Planning Guide</li> </ul>	<ul style="list-style-type: none"> <li>How To Make Medical Decisions for Other People Guide</li> </ul>

<p><b>Handouts to be given (or discussed) at the END of the session (Optional):</b></p>	<ul style="list-style-type: none"> <li>• How To Make Medical Decisions for Other People Guide [Optional]</li> <li>• PREPARE for YOUR Care Pamphlet</li> <li>• Easy-to-Read Advance Directive</li> </ul>	<ul style="list-style-type: none"> <li>• How To Help Other People With Their Medical Planning Guide [Optional]</li> <li>• <b>PREPARE for YOUR Care</b> Pamphlet</li> <li>• Easy-to-Read Advance Directive</li> </ul>
---	---	--



**For Online Sessions:** Before sharing handouts, determine the best format to provide materials (e.g., hard copy, PDF, word, text within email (no attachments)). You can mail or email participants the materials ahead of time. Be clear in the cover letter or the email which materials you will plan to go over at the start or during the session and which you will go over at the end of the session to prevent confusion.

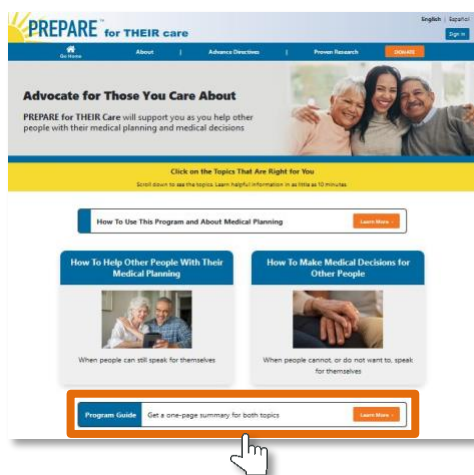
Here is a summary of each handout for your reference:

- **The PREPARE for THEIR Care Program Guides**

The Program Guides provide a summary of the topics covered in all the **PREPARE for THEIR Care** videos. They are not legal documents.

Download the Program Guides from the **PREPARE for THEIR Care** website (see Image 4): [PREPAREforTheirCare.org](http://PREPAREforTheirCare.org)

There are two **PREPARE for THEIR Care** Program Guides, one for the topics covered in **Part 1** and another for **Part 2** (see Image 5).



**Image 4:** Where to download Program Guides on website



**Image 5:** PREPARE for THEIR Care Program Guides on website



- **The PREPARE for **YOUR** Care Program Guide**

This Pamphlet (see **Image 6**) has brief notes about the 5 steps of the **PREPARE for **YOUR** Care** program; the other PREPARE program is designed to help people with their **OWN** medical planning so they can have a voice in their medical care. It also has the **PREPARE for **YOUR** Care** website URL.

Download the **Pamphlet** here:

<https://prepareforyourcare.org/en/partner-with-prepare/tools-and-handouts/patient-and-caregiver-handouts>

Participants can share this Pamphlet with their family and friends.



**Image 6: PREPARE for **YOUR** Care Program Guides on website**

- **The PREPARE easy-to-read Advance Directive**

The Advance Directive is an easy-to-read (5<sup>th</sup> grade reading level) legal form that allows people to name a medical decision maker and to write down their medical wishes, see **Image 7**. You will let participants know you will go over the advance directive in more detail at the end of the event (see **Part 2** scripts).

*\*Please use the appropriate state-specific advance directive for the state of your participants.*

Download the **Advance Directive** here:

<https://prepareforyourcare.org/en/prepare-for-your-care/advance-directive/advance-directive-welcome>

Participants can share this form with their family and friends.



**Image 7: Advance Directive**



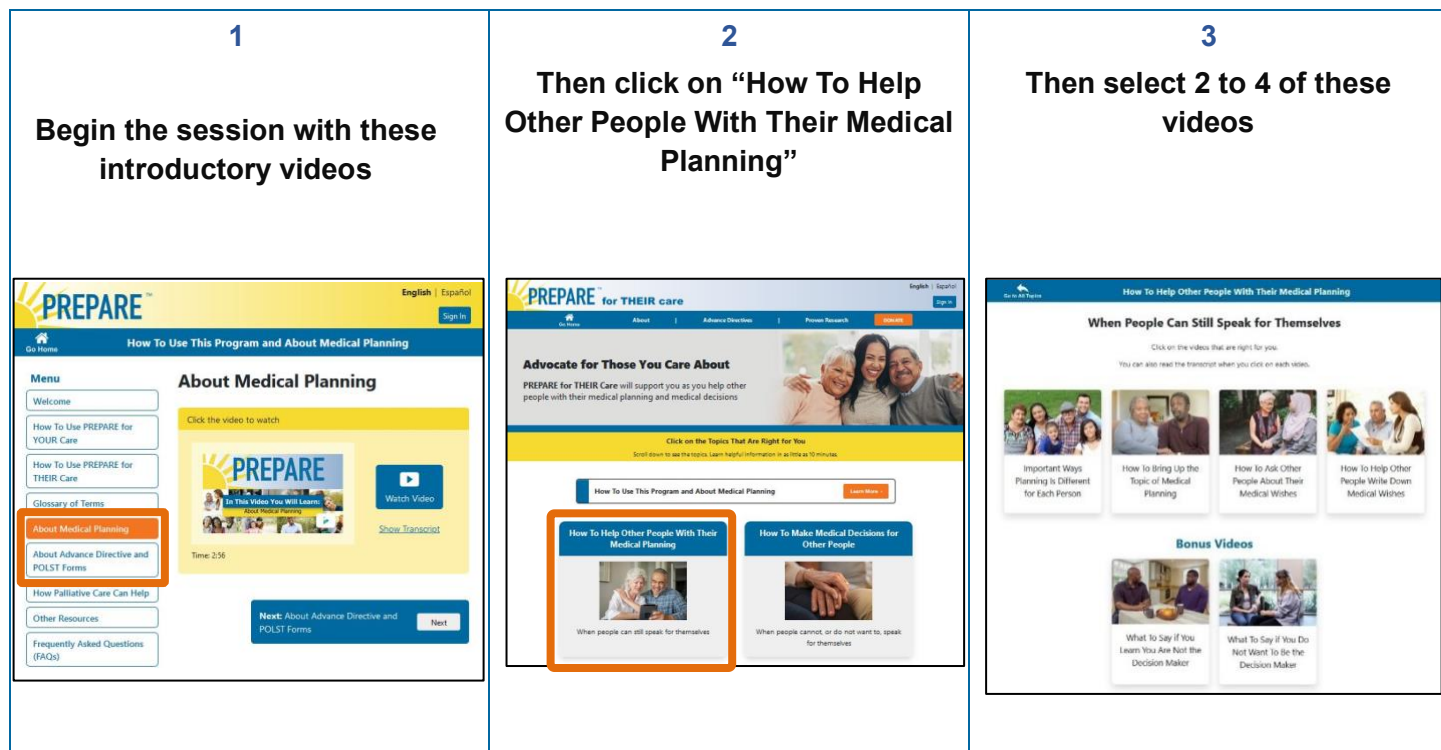
## Step 3. Play the PREPARE for THEIR Care Videos

After introducing the PREPARE handouts, you will play the videos you selected for the group (See [Chapter 2](#)). Let the group know what videos you will be playing (based on time). You can also ask the audience which videos they are interested in watching.

- **Number of videos and length of session.** It's easy to overwhelm or bore the group with too much information. We recommend spending no more than **20 to 30 minutes** playing the videos. This may mean playing 3 to 4 videos per session. The rest of the time should be dedicated to processing the information through discussion and/or other interactive activities.
  - **Flexibility and caveats:** You may encounter unforeseen challenges, and you may need to be flexible and adjust accordingly. For example, you may only have access to your participants for one day, so you may want to show them more videos with a break in between. Or you may only have access to the room for 60 minutes instead of 90 minutes, so you only play 1 to 2 videos instead of 3 to 4.
- **Scheduling multiple sessions.** If you are able to have multiple sessions, you can show more videos split over multiple days. You can either show a subset of videos, ask participants what they are most interested in, or show all videos as long as you let participants know that the session will take longer than 60 to 90 minutes. Below, we present you with video suggestions for you to play if you are planning on having two sessions.
- **Recording your session.** Consider recording the session in case people are unable to attend it. Remember to ask attendees if they are OK with recording and sharing the session. If you cannot record, you can share the **PREPARE for THEIR Care** website [PREPAREforTheirCare.org](https://PREPAREforTheirCare.org) with them so they can watch the videos on their own.

## Hosting One Session

If you are planning on having ONE session for “How To Help Other People With Their Medical Planning” (Part 1), we recommend the following, illustrated in **Image 8**:


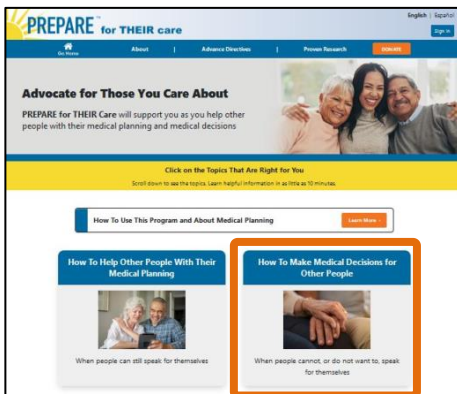
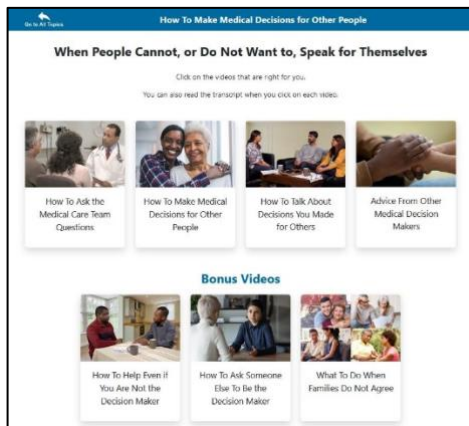


**Image 8:** Videos to show if only having one session for “How To Help Other People With Their Medical Planning” (Part 1)

Select 2-4 videos. Total time for all 6 videos ~ 30 minutes. You can decide (and/or ask your participants) whether to show all 6 videos. Please click on the closed captioning button [CC] when you hit play.

- **Important Ways Planning is Different for Each Person** (~5 minutes)
- **How to Bring Up the Topic of Medical Planning With Your Family and Friends** (~7 minutes)
- **How To Ask Other People About Their Medical Wishes and Medical Planning** (~7 minutes)
- **How To Help Other People Write Down Their Medical Wishes on an Advance Directive Legal Form** (~5 minutes)
- **BONUS: What To Say if You Learn You Are Not the Decision Maker** (~3 minutes)
- **BONUS: What to Say if You Do Not Want To Be the Decision Maker** (~1 minute)

If you are planning on having ONE session for “How To Make Medical Decisions for Other People” (Part 2), we recommend the following, illustrated in Image 9:

1	2	3
<p><b>Begin the session with these introductory videos</b></p>  <p><i>Optional: If the group has a lot of experience with advance directives, you may skip. However, the video is short and it can be a good reminder and way to start the session.</i></p>	<p><b>Then click on “How Make Medical Decisions for Other People”</b></p> 	<p><b>Then select 2 to 4 of these videos</b></p> 

**Image 9:** Videos to show if only having one session for “How to Make Medical Decisions for Other People” (Part 2)

Select 2-4 videos. Total time for all 6 videos ~ 30 minutes. If you only have ONE session, you can decide (and/or ask your participants) whether to show all 6 videos.

- **How to Ask the Medical Care Team Questions** (~9 minutes)
- **How To Make Medical Decisions for Other People** (~12 minutes)
- **How To Talk About Decisions You Made for Others** (~10 minutes)
- **Advice From Other Medical Decision Makers** (~7 minutes)
- **BONUS: How To Help Even if You Are Not the Decision Maker** (~4 minutes)
- **BONUS: How to Ask Someone Else to Be the Decision Maker** (~2 minutes)
- **BONUS: What To Do When Families Do Not Agree** (~6 minutes)

## Hosting Two or More Sessions

In **Table 7** and **Table 8**, we present you with video suggestions for you to play if you are planning on having two or more sessions.

**Table 7. Sample Agenda for a Two Day Session for  
“How To Help Other People With Their Medical Planning” (Part 1)**

Number of sessions you plan on hosting	Video suggestions to play at your session (Video times are approximate)
<b>Two sessions – Day 1</b>	<p><b>Begin Day 1 session with these introductory videos:</b></p> <ul style="list-style-type: none"> <li>• How To Use PREPARE for THEIR Care (~8 minutes)</li> <li>• About Medical Planning (~3 minutes)</li> </ul> <p><b>Then play these videos:</b></p> <ul style="list-style-type: none"> <li>• Important Ways Planning is Different for Each Person (~5 minutes)</li> <li>• How to Bring Up the Topic of Medical Planning With Your Family and Friends (~7 minutes)</li> </ul>
<b>Two sessions – Day 2</b>	<p><b>For Day 2 session, play these videos:</b></p> <ul style="list-style-type: none"> <li>• How To Ask Other People About Their Medical Wishes and Medical Planning (~7 minutes)</li> <li>• How To Help Other People Write Down Their Medical Wishes on an Advance Directive Legal Form (~5 minutes)</li> <li>• <b>BONUS:</b> What To Say if You Learn You Are Not the Decision Maker (~3 minutes)</li> <li>• <b>BONUS:</b> What to Say if You Do Not Want To Be the Decision Maker (~1 min)</li> </ul>

**Table 8. Sample Agenda for a Two Day Session for  
“Part 2: How To Make Medical Decisions for Other People”**

Number of sessions you plan on hosting	Video suggestions to play at your session (Video times are approximate)
<b>Two sessions – Day 1</b>	<p><b>Begin Day 1 session with this introductory video (play it only if your participants don’t know much about Advance Directive Forms):</b></p> <ul style="list-style-type: none"> <li>• How To Use This PREPARE for THEIR Care (~8 minutes)</li> <li>• About Advance Directive and POLST Forms (~4 minutes)</li> </ul> <p><b>Then play these videos:</b></p> <ul style="list-style-type: none"> <li>• How to Ask the Medical Care Team Questions (~9 minutes)</li> <li>• Advice From Other Medical Decision Makers (~7 minutes)</li> </ul>
<b>Two sessions – Day 2</b>	<p><b>For Day 2 session, select 3 to 4 of these videos:</b></p> <ul style="list-style-type: none"> <li>• How To Make Medical Decisions for Other People (~12 minutes)</li> <li>• How To Talk About Decisions You Made for Others (~10 minutes)</li> <li>• <b>BONUS:</b> How To Help Even if You Are Not the Decision Maker (~4 minutes)</li> <li>• <b>BONUS:</b> How to Ask Someone Else to Be the Decision Maker (~1 minute)</li> <li>• <b>BONUS:</b> What To Do When Families Do Not Agree (~6 minutes)</li> </ul>

## Step 4. Ask Questions and/or Facilitate Group Discussions

After each video ends, you will ask participants if they have any questions or want to discuss the video.

**\*Note:** You do NOT need to know all the answers. Refer to the **PREPARE for THEIR** Care FAQs page online (you may want to review it before the event):

<https://prepareforyourcare.org/en/prepare/faqs/welcome>

**Optional:** If no one is talking, you can take a moment to share your own story or example. This can also be an excellent time to get the group talking and learning from each other.

Each group is different. Some groups may want to have long discussions and share their experiences. If people are engaged, you do not need to feel as though you have to get through all the videos you had planned. Some groups may be less talkative so you may get through more videos. While encouraging participation is great, not everyone will be comfortable participating. Give participants the option to pass or just listen as well.

Depending on time, you may want to offer your participants a **5-minute break** between videos.

Review the **PREPARE for YOUR** Care Pamphlet and **Easy-to-Read Advance Directive**

- **PREPARE for YOUR** Care Pamphlet:  
Using the scripts in this Toolkit, tell people about the **PREPARE for YOUR** Care program, show the Pamphlet, and where the website URL can be found for later use.
- **PREPARE Easy-to-read Advance Directive:**  
Orient people to what the form is using the scripts in this Toolkit. You will read over the cover page of the Advance Directive form. If there is time at the end of the session, you can go over each section of the Advance Directive form.

## Step 5. Wrap Up & Thank You

Wrap up the event by reminding participants about the **PREPARE for THEIR** Care Program Guide(s). The Program Guide(s) provide a brief summary of the **PREPARE for THEIR** Care videos that were shown today. They also have the **PREPARE for THEIR** Care website URL at the bottom of the front page. Remind participants that they can revisit the **PREPARE for THEIR** Care website to rewatch any of the videos on their own and at any time.

### Optional: Validated Questions to Ask Participants After the Event

Don't forget that if you assessed whether the event improves peoples' knowledge, attitudes, and readiness before your event, you will want to assess participants to complete the validated questions after the event. See the **APPENDICES** for a copy of the validated questions.

## Optional: Feedback from Participants After the Event

You may consider getting feedback about the Group Session. This can be done by verbally asking participants for feedback at the end of the session or by asking participants to fill out the Feedback Survey (See the **APPENDICES** for a copy of the Feedback Survey). If you prefer to keep feedback anonymous, you do the following depending on whether your session is in-person or online. This is optional, but the feedback can help you improve the delivery of the PREPARE sessions and/or help our team improve the PREPARE materials and Group Sessions.



**For In-Person Sessions:** You can hand out a Feedback Survey. You can design your own or use the **PREPARE** Feedback Survey. See the **APPENDICES** for a copy of the Feedback Survey.



**For Online Sessions:** You can mail participants a Feedback Survey or email them a Feedback Survey link if you create a survey using SurveyMonkey or Google Forms. You may also consider making a pre- and post-poll for your videoconferencing session.

## Optional: Facilitator Feedback After the Event

We'd like to hear from you! Please fill out our Feedback Survey here and follow the instructions. If there are ways that we can update this Toolkit or if you have other suggestions. Please share your ideas with us.

Click on “Provide feedback,” “PREPARE Session,” and role as “Organizer (see **Image 10**):

<https://redcap.ucsf.edu/surveys/index.php?s=EAK3HK4X4C>

## Optional: After Session Office Hours

If possible, hold space after the Group Session is dismissed to invite folks with individual questions to ask them. These might be personal questions they did not feel comfortable asking in the group or personalized information that applies to their situation.

Remember, if you do not know the answer, it's okay to refer to the FAQs (<https://prepareforyourcare.org/en/prepare/faqs/welcome>) or be honest about what you don't know, but you can try to find the answer.

**PREPARE Feedback Form**

Please complete the survey below.  
Thank you!

1. Please choose your reason for contacting us:

- ☐ Report a technical problem
- ☒ Provide feedback to make PREPARE better
- ☐ Ask about licensing opportunities

Click as many as you want.

2. Which PREPARE tool would you like to help us improve?

- ☐ PREPARE Website Steps
- ☐ PREPARE Advance Directive
- ☐ PREPARE Summary of My Wishes
- ☐ PREPARE Pamphlet
- ☒ PREPARE Movie & Movie Toolkit for Group Events
- ☐ PREPARE Question Guide
- ☐ Something else?

Click as many as you want.

**PREPARE Movie and Movie Toolkit for Group Events**

Was the movie event in English or Spanish?

- ☐ English
- ☐ Spanish
- ☐ Other

1. What role did you play in the PREPARE movie group event?

- ☒ Organizer
- ☐ Participant

reset

**Image 10: PREPARE Feedback Form for facilitators**



## General Facilitation Tips

The next few pages will show some general facilitation tips and information. They include instructions and scripts (words you can say). We make scripts easy by providing a symbol to indicate words you can say (see the box below).

This symbol  with **bolded text** = words the facilitator can say

## Tips on Creating an Inclusive Safe Space

Facilitators are in a unique position to create spaces for participants to feel safe about sharing their ideas and points of view on topics that can be difficult to talk about (e.g., medical planning, death, serious health conditions). There are ways to create a safe and respectful space for participants.

- Facilitate dialogue. It is important to encourage everyone to be open to different points of view. These topics may be uncomfortable, but that is why it's important to have a dialogue about them.
- Acknowledge the possible discomfort of participants and reassure them that their feelings are valid and their contributions to the discussion are valuable.
- Insist on the use of active listening by all participants. Active listening demonstrates unconditional acceptance and unbiased reflection.
  - Give your undivided attention to your body language.
  - Paraphrasing the speaker's message (both content and feelings) by restating, in the listener's own words, what the listener thinks the speaker is trying to say.
  - Ask questions to encourage the speaker to elaborate, if appropriate.
- Setting ground rules can help you create an inclusive, safe space.
- If there are people in the audience with cognitive impairment or hard of hearing, we recommend showing no more than one video at a time and pausing the video more often to allow people to digest the information. Each video includes features designed to enhance accessibility for participants with cognitive impairment or who are hard of hearing.

- Enhance accessibility using the video features to tailor to your participants needs, see **Image 11**. Customize by adjusting sound levels, enabling closed captions (subtitles), displaying the audio transcript, modifying video speed, navigating through video chapters, and resizing the video for optimal viewing (zoom in/out).



**Image 11:** Video Features

## Tips on Handling Questions

You do NOT need to be an expert or to know all the answers.

People may have questions you may need help to answer. This is OK! You may want to review the FAQs (<https://prepareforyourcare.org/en/prepare/faqs/welcome>) before the event as these are the questions asked most often.

Depending on your audience, you may decide to ask your group if anyone else knows the answer.



**“That is a really good question. I am not sure of the answer. Does anyone in the group know the answer? Or has anyone experienced this and can share what they did or learned?”**

You may also decide to ask the person or group if it is OK to follow up by phone, text, or email with the answer. Keep a list of unanswered questions and bring them to the PREPARE team ([info@PREPAREforYourCare.org](mailto:info@PREPAREforYourCare.org)).



**“That is a really good question. I am not sure of the answer. I can reach out to the PREPARE team about your question. Would it be OK to follow up with you later with the answer? Do you prefer a phone call, text message, or email? Would other group members also like me to send them the answers to this question?”**

Some questions may be about a person’s medical condition or social or legal situation. In this case, you can say:



**“That is a really good question. I am not sure of the answer. I recommend you follow up with this person’s medical providers and/or lawyers about that.”**



## Tips on Handling “Sharers”

Some people may want to share long stories or have several questions that cannot be answered during the event. It is OK to thank that person and let them know that their questions will be answered later or that you hope to save time to come back to their stories/questions later. It may help to take notes so you can remind yourself of people’s questions for later in the program.



**“We really appreciate you sharing your story/asking your question(s). Some of this content will be covered in the videos you will be watching. For the sake of time, let’s move on now to get to all the videos we have planned for today. Let me also take a note. We hope to save time and come back to your story/question(s) a little later in the program.”**

## Frequently Asked Questions (FAQs)

You do **NOT** need to know all the answers. Refer to the **PREPARE for THEIR Care FAQs** page online using this link:

<https://prepareforyourcare.org/en/prepare/faqs/welcome>.

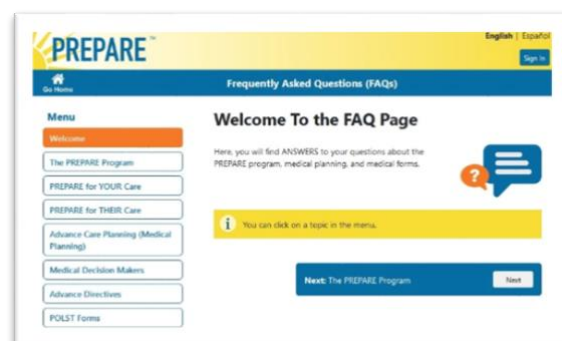
For now, you can find the FAQs page on the **PREPARE for THEIR Care** page ([PREPAREforTheirCare.org](https://PREPAREforTheirCare.org)) by going to the section entitled “How To Use This Program and About Medical Planning” and clicking on “Frequently Asked Questions (FAQs)” in the left-side navigation panel, see **Image 12** and **13**. FAQ can also be found at the bottom of the PREPARE for YOUR Care homepage ([PREPAREforYourCare.org](https://PREPAREforYourCare.org)).



**Image 12:** How To Use This Program and About Medical Planning on website



**Image 13:** FAQs will appear on the left-side navigation panel. Click on “Go to the PREPARE FAQs”



**Image 14:** FAQs Page on website

Click on “Go to the PREPARE FAQs” to get to the FAQ Page, see **Image 13** and **14**.



**Step 3**

# **Outreach**

## Chapter 4 Outreach and Recruitment

Chapter 4 teaches you how to promote (or outreach) to potential group members.

### Step 3

## Outreach

On **Pages 34 to 37**, you will find the following information:

- [Outreach Overview](#), **Page 34**
- [Sample Outreach Materials](#), **Page 35**
- [Making First Contact and Engaging Participants](#), **Page 35**
- [Follow-up, Sending Reminders, and Instructions](#), **Page 36**

## Outreach Overview

In this section, we walk you through the outreach process.

### Where to reach out

Use your contacts, community, societies, hospitals, and clinics to send them information about your Group Sessions. The outreach possibilities are endless; be creative!

Other ideas include:

- Anything you can do **face-to-face** is great—for example, talks to community groups, announcements made at senior lunch programs, etc.
- Many churches, senior centers, etc., have **newsletters and websites**. Ask about how you can get your session posted.
- Consider **marketing to a condition-specific organization or group**, such as offering a session for people living with mild cognitive impairment, cancer, etc.

### How to reach out

You can promote your **PREPARE for THEIR Care** Group Session in many ways. You can promote the **PREPARE for THEIR Care** Group Session using the materials (flyers) included in this Toolkit. Choose the one that works best for you and your audience:

- Newsletter blurb
- Email / E-blast (e.g., email or messaging service like WhatsApp)
- Submission for Community Calendar, local paper, etc.
- Physical flyers
- Word-of-mouth
- Social media (e.g., Facebook, Instagram, etc.)

## Content to include on outreach materials

When promoting your Group Session, keep the messaging, color scheme, logos, and typeface consistent over time so those receiving the material will think of your Group Session. In this Toolkit, we provide templates and sample text that can be copied and pasted into your outreach materials.

Be sure to include the following information:



**For In-Person Sessions:** Include date, time, location, length, contact information, parking, and ask if you have special needs.



**For Online Sessions:** Include date, time, length, contact information, and video teleconferencing link; let them know if they can get technical support

Regardless of your outreach approach, be sure to include a way for participants to sign up for the groups or to reach out if they have questions.

## Sample Outreach Materials

In the **APPENDICES** section of this Toolkit, we provide templates and sample text that can be copied and pasted to be used for your outreach materials.

## Making First Contact and Engaging Participants

Once you have a pool of interested participants, it's time to engage them.

- **Make the first contact.** Calling or emailing all registered participants is the easiest way to accomplish first contact.
- **Boost engagement.** Introduce yourself, share upcoming session details (**APPENDICES** has templates), and encourage potential participants to ask questions. If you plan to share materials ahead of time, send the appropriate **PREPARE for THEIR Care** handouts for your session (See **Group Session Overview** in [Chapter 5](#) for a list of handouts),

- **Special accommodations.** Ask about special accommodations or needs such as audio, visual, mobility, etc.
- **Including family/friends.** Care partners can invite their family/friends to join the session if desired.



**For In-Person Sessions:** Remind participants to bring hearing aids, glasses, durable medical equipment, medications, and designated parking, if applicable.



**For Online Sessions:** Remind participants to use hearing aids, glasses, speakers, etc. Ask if they have a tablet or a computer to engage in videoconferencing (a phone can be used, but it is not ideal). Offer technical support or suggest a separate session to orient them using the videoconferencing platform. Schedule the technical orientation session, ideally during your first contact with participants.

## Offer a technical orientation session (if applicable)

Consider scheduling an individual or group technical orientation session before your Group Sessions. The purpose of this technical orientation session is to walk participants through the videoconferencing platform and how to use it. This is incredibly important for participants who are not comfortable using videoconferencing.

Topics you may cover in this orientation session include:

- How to join an online session
- How to mute and unmute
- How to enable the camera and set up camera angles
- How to change your display name
- How to use the chat function

If you have technical support, this person can run these sessions.

## Follow-up, Sending Reminders, and Instructions

Contact participants before each Group Session to remind them about the date and time. For those who are able, please encourage them to add the event to their personal calendars. Re-send the location address (for in-person sessions) or instructions for how to join the session (for online sessions). Encourage participants to arrive or join 10 minutes early regardless of delivery mode. Also, remind them to bring glasses, hearing aids, or anything else before the start of the session so they can be comfortable and engage in the Group Session.

Encourage participants to invite their family/friends to join the session. Provide your contact information so participants can reach you with questions or concerns.

Some people may be concerned about their anonymity. Before the session, notify participants about the following:



**For In-Person Sessions:** Participants can use a nickname or alias if they have privacy concerns.



**For Online Sessions:** Participants can use a nickname or alias and/or decide to turn off their cameras if they have privacy concerns. They may also use the chat function if they do not feel comfortable speaking.

If you have participants who are interested but unable to attend, you can share the **PREPARE for THEIR Care** website ([PREPAREforTheirCare.org](https://PREPAREforTheirCare.org)) so they can watch the videos on their own or offer them to come to the next session if you are hosting multiple sessions.



**Do**

## Chapter 5 Running the Group Session

In Chapter 5, you will learn how to run your groups with checklists and words you can say (scripts).

On **Pages 39 to 85**, you will find the following information:



**Do**

- [Checklist for the Group Sessions](#), **Page 39**

**Part 1**

- [Group Session Overview of “How To Help Other People With Their Medical Planning” \(Part 1\)](#), **Page 44**
- [Scripts of What to Say During “How To Help Other People With Their Medical Planning” \(Part 1\)](#), **Page 45**

**Part 2**

- [Group Session Overview of “How To Help Make Medical Decisions for Other People” \(Part 2\)](#), **Page 56**
- [Scripts of What to Say During “How To Help Make Medical Decisions for Other People” \(Part 2\)](#), **Page 57**

- [Appendices](#), **Page 66**

### Checklist for Group Sessions

Congratulations! You are now ready to run a **PREPARE for THEIR Care** Group Session.

This checklist has all the items you need and things to do to prepare for your PREPARE in-person Group Session. This is a general guide for both “How to Help Other People with Their Medical Planning” (**Part 1**) and “How to Make Medical Decisions for Other People” (**Part 2**).

### Before the Group Session

- ☐ **Invite a partner or other facilitator.** They would help you set up the room and make sure the groups run smoothly.
- ☐ **Promote the PREPARE Group Session.**



- ☐ **Contact participants shortly before the event.** Remind them about the date, time, and location or session link. Remind them to bring glasses, hearing aids, or anything else to the session so they can be comfortable. Remind participants to add the Group Session to their personal calendars.



#### For Online Sessions:

- **Schedule technical orientation sessions.** This is for those who need it.
- **Send email reminders.** Make the email subject clear, include the session link, and include instructions on how to join the online session, and encourage them to join 5 minutes early.

### Equipment

- ☐ **A copy of this Toolkit** for the facilitator to use as they lead the session
- ☐ **A clock, watch, phone, or laptop** to keep time
- ☐ **A desktop or laptop computer** and **an internet connection**



#### For In-Person Sessions:

- **Speakers or microphone**
- **A TV to connect your laptop to or a projector and presentation screen** (a blank wall can also work)
- **Pens or pencils**



#### For Online Sessions:

- **A web camera and microphone**
- **A second computer monitor** (optional)
- **Have contingency plans should any of this equipment fail.** For example, if Wi-Fi connection fails, prepare to connect to your data plan's hotspot or an ethernet

### Handouts

See **Table 6** in [Chapter 3](#) for which handouts to use for **Parts 1** and **2**

- ☐ **PREPARE for THEIR Care** Program Guides
  - How To Help Other People With Their Medical Planning (**Part 1**)
  - How To Make Medical Decisions for Other People (**Part 2**)
- ☐ **PREPARE for YOUR Care** Pamphlet
- ☐ **PREPARE Advance Directive**

☐ **Feedback Survey** (Optional)


**For In-Person Sessions:** Print the handouts for each person. Bring the handouts to the session with you.



**For Online Sessions:** Before sharing handouts, determine the best format to provide materials (e.g., hard copy, PDF, word, text within email (no attachments)). You can mail participants the materials ahead of time. If you plan on sending the materials by email, we recommend doing so after the session to avoid confusion.

## Review & Decide on the Videos to Show

- ☐ **Review Chapter 5 of this Toolkit** with the “Scripts” and words you can say
  - How To Help Other People With Their Medical Planning (**Part 1**)
  - How To Make Medical Decisions for Other People (**Part 2**)
- ☐ Review the "**How To Use PREAPRE for THEIR Care**" video at [PREPAREforTheirCare.org](https://prepareforyourcare.org/en/prepare/faqs/welcome)
- ☐ Review answers to the **FAQs** at <https://prepareforyourcare.org/en/prepare/faqs/welcome>
- ☐ Based on **Part 1** or **Part 2**, plan which videos you will play (See [Chapter 3](#) for sample session agendas).

## During the Group Session

- ☐ **Arrive early.** We recommend arriving or logging on 30 minutes ahead of time to set up.
- ☐ **Log onto the laptop** and connect to the internet.
- ☐ **Connect the laptop** to the TV or projector or computer monitor and speakers, if applicable.
- ☐ **Make sure the computer can connect** to the internet and the PREPARE website.
- ☐ **Hand out pens or pencils** (for in-person sessions) or announce a pen or pencil will be needed (for online sessions).
- ☐ **Hand out or hold up** (for in-person sessions) or **show on a shared screen** (for online sessions) the **PREPARE for THEIR Care** Program Guide(s) and optional Feedback Survey. If putting on **Part 1: How to Help Other People with Their Medical Planning**, also hand out the **PREPARE for YOUR Care** Pamphlet and **PREPARE Advance Directive form**.
- ☐ **Create a time schedule for the event.** We recommend 60 minutes to 90 minutes.
  - Each video can take anywhere between 2 to 10 minutes to play. You will need to allow time for discussion and questions after the videos.
  - Some talkative groups may not get through all the videos in the section. Other groups may get through all the videos in the section and still have time to review the videos in the other section.
- ☐ **Decide on the videos you will show** based on the time you have. Make sure to click on the closed captioning button [CC].
- ☐ **Make sure participants can see and hear the videos.**
- ☐ **Remind participants to use glasses and/or hearing aids.**

- ☐ If questions come up during the session, refer to the **PREPARE for THEIR Care** FAQs page online: <https://prepareforyourcare.org/en/prepare/faqs/welcome>

**For In-Person Sessions:**

- **Know where the bathrooms are** and schedule in bathroom breaks.
- **Set up the tables and chairs** so all participants can see the screen.
- **Play the videos beforehand** to test the internet quality and audio.

**For Online Sessions:**

- **Schedule in bathroom breaks.**
- **Enable all videoconferencing features.**
- **Play the videos beforehand** to test the internet quality and audio, making sure the audio is set to feed from the local device.

## Optional

- ☐ **You may decide to invite a guest speaker.**
  - If you do, share the PREPARE website, videos, and materials with them ahead of time.
  - You should also get brief information about the speaker so you can introduce them at the event
- ☐ **You may also consider getting feedback** about the group (See the **APPENDICES** for a copy of the Feedback Survey). This is optional but can help us improve the PREPARE materials and Group Sessions.

**For In-Person Sessions:**

- **Consider snacks and something to drink.**

## Part 1

# How To Help Other People With Their Medical Planning

### How To Help Other People With Their Medical Planning



When people can still speak for themselves

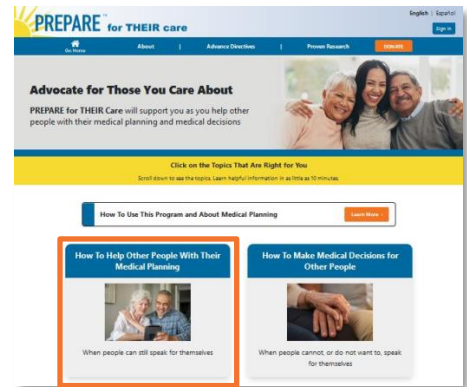
## Group Session Overview for “How to Help Other People With Their Medical Planning” (Part 1)

Here is a **brief overview** to give you an idea of what to expect when putting on a session **for people who can still make their own medical decisions** (Part 1; see Image 15).

**PREPARE for THEIR Care** will help support family members and caregivers in helping other people with their medical planning.

For steps and scripts for how to conduct **Part 2**, go to **Page 56**.

**NOTE:** This Toolkit gives you specific steps and scripts for how to conduct **Part 1**. Specific scripts for what to say start on **Page 45**.



**Image 15:** “How To Help Other People With Their Medical Planning” on website

**Step 1.** Introduction & Logistics

**Step 2.** Introduce the PREPARE for THEIR Care Program Guide

- How To Help Other People With Their Medical Planning Guide (**Part 1**)
  - **Download:** <https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Help-Others-With-Medical-Planning-English.pdf>

**Step 3.** First, Play the Videos:

- “How To Use PREPARE for THEIR Care”
- “About Medical Planning”
- “About Advance Directive and POLST Forms”
- Next, Play the Videos You Have Chosen from the Section Entitled: “How To Help Other People With Their Medical Planning” (**Part 1**)

**Step 4.** Ask about Questions and/or Facilitate Group Discussions

**Step 5.** Wrap Up & Thank You

- Review the PREPARE Handouts
  - How To Help Other People With Their Medical Planning Guide (**Part 1**) (Same as above)
  - How To Make Medical Decisions for Other People Guide (**Part 2**) (Optional)
    - **Download:** <https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Make-Medical-Decisions-For-Others-English.pdf>
  - **PREPARE for YOUR Care Pamphlet**
    - **Download:** <https://prepareforyourcare.org/en/partner-with-prepare/tools-and-handouts/patient-and-caregiver-handouts>
  - Easy-to-Read Advance Directive
    - **Download:** <https://prepareforyourcare.org/en/prepare-for-your-care/advance-directive/advance-directive-welcome>
- Feedback [Optional]

## Scripts of What to Say During “How To Help Other People With Their Medical Planning” (Part 1)

Reminder to facilitator:

*Italicized gray text = instructions to the facilitator*

This symbol  with **bolded text** = words the facilitator can say

### Step 1. Introductions & Logistics

*Introduce yourself and welcome participants.*



**“We are so excited you could join us today and look forward to learning together. My name is X** *[and I am from Y organization. With me today are X, Y, Z co-facilitators].*

**This session is about supporting you as you help other people with their medical planning. Medical planning helps people have a voice in their health care. Sometimes, medical planning is also called advance care planning.**

**Medical planning allows people to:**

- **Name a trusted medical decision maker**
- **Tell their medical decision maker(s) and medical care team what is most important for their quality of life and healthcare, and**
- **write down the name of their medical decision maker and medical wishes on an advance directive form.**

**Let’s get started. Today, we will be watching some of the PREPARE for **THEIR** Care videos and then, if people feel comfortable, talking about them as a group. This program will show you how to help other people with their medical planning. This program may take 60 to 90 minutes depending on how many videos we want to watch and how much conversation we have as a group. If you need to leave early, please feel free to do so.”**

### Cell phones



**“We ask that you please turn off your cell phones and ideally put them away so we stay focused.”**

## Facilities



### For In-Person Sessions:



“The bathrooms are *[down the hall, etc.]*. Please feel free to get up and use the bathroom whenever you want.”

## Camera, Chat, and Mute Button



### For Online Sessions:



**Cameras and chat:** “If you feel comfortable and are able to, please turn on your camera. I would like to see who I am talking to, and it will help me gauge the room, etc. Also, if you feel shy or don’t want to speak, you can use the chat to ask questions or comments.”



**Mute button:** “Please turn off your microphone with the “mute” button when you are not speaking. This helps us get rid of background sounds that might distract us.”

## Emotions and Feelings



“We understand that this topic, along with the videos and stories, may remind you of difficult personal experiences and bring up strong emotions. Please feel free to step out and take a break if needed.”

## Confidentiality



“People in our group may also talk about personal experiences. I would also like to ask each of you to respect your fellow participants and keep any personal information shared here confidential and within this group. Can I get a verbal “yes” from each of you, saying that you agree to keep all personal information discussed today private? Thank you.”

## Ice Breaker Questions *[Optional]*:

### Option #1: Show of Hands *[Optional]*



“By show of hands *[or virtual hands]*... *(pick one example from below or come up with your own)*

- How many of you have heard of medical planning or advance care planning?

- How many of you have completed your own advance directive?
- How many of you are here to learn information to help a family member or a friend with their medical planning?
- How many of you are here to learn about information to help your patients or clients with their medical planning?
- Is anyone interested in learning how to put on one of these group events in the future? (Great, please see us after the session)

### **Option #2: Group Introductions [Optional]**

*Group size will vary. Depending on the group size and the time you have, you may ask people to introduce themselves and briefly share what they hope to gain from the event.*



“For introductions, we would like to go around the room and ask for your first name only if you feel comfortable sharing. It would also be helpful to know what you hope to get out of the event today. We only have a few minutes, so I will ask you to be brief. Not everyone feels comfortable speaking in a group setting. If we get to you and you do not want to share, you can say PASS. I will go first. Again, my name is X, and I hope to [e.g., learn new things from our group discussion today].”

### **Option #3: Sharing Your Story [Optional]**

*If you feel comfortable, it can be helpful for you as the facilitator to share a personal story that illustrates why getting people to do their medical planning is so important and/or why you are leading a group today. Sharing a brief story at the beginning is a good way to build trust and help people feel safe sharing their own stories.*

*Examples:*

- *National Healthcare Decisions Day, Re-Imagine or other*
- *Personal stories about a family member or a friend: ~ This is how medical planning helped them and their family/friends*
- *Personal stories in your line of work, etc. Example: “As a social worker or case manager...”*

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## **Step 2. Introduce the PREPARE for THEIR Care Program Guide**

*If in person, pass out the Program Guide. If virtual, share your screen and take a moment to put a link in the chat or let participants know you will email the Program Guide after the session.*



“I want to take a moment to introduce a handout that we will use while watching the videos. There will be more handouts that we will give you at the very end of the session.”



The PREPARE for **THEIR** Care Program Guide (*hold it up or share screen*) is about “How To Help Other People With Their Medical Planning” and can help you when your family and friends can still speak for themselves. This Guide summarizes the information in the videos we will watch together today.

During our session, before we watch a video, I will point to this Guide where you can find the summary of that video. That way, after you watch the video, you will also have a written reminder of the information in the video that you can take home with you.

We will only get to some of the videos in this section today, but you can visit the PREPARE for **THEIR** Care website on your own to watch any of the videos at any time. The website URL is listed at the bottom of the front page of the Program Guide (*hold it up or share screen*).”

## Step 3-4. Play the PREPARE for THEIR Care Videos & Ask About Questions and/or Facilitate Group Discussion



“Now we will watch the videos. It is OK if these topics are new to you. PREPARE for **THEIR** Care will walk you through it step-by-step. We hope all of you will get some helpful information today from the videos and each other.

At the end of each video, I will ask if people have any questions or want to discuss what we watched. I will also check to see if we need a short break.”

\*Below, you can pick and choose which videos to show and which to start with.

### Play the Video entitled: “How To Use PREPARE for THEIR Care”



“Let’s begin with a video that introduces the PREPARE for **THEIR** Care program and how to use it.”

*Show the video “How to Use PREPARE for THEIR Care” (~8 minutes, see **Image 16**).*

*When you start playing the video, ask if everyone can hear to make sure all participants can see and hear the video.*



**Image 16:** “How To Use PREPARE for THEIR Care” video on website

## Play the Video entitled: “About Medical Planning”



“Now we’ll watch a video about medical planning. Medical planning is also sometimes called ‘advance care planning.’ It is a process that supports adults at any age or stage in health in understanding and sharing what is most important to them in their lives and for their health care. It is also a way for people to prepare to make informed medical decisions and to make sure they have a voice in their medical care, even if they are seriously ill.”

Show the video “About Medical Planning” (~3 minutes, see **Image 17**).

After Playing:



“As the video shows, medical planning can involve someone naming another person to be their advocate in case of a medical emergency. Today, we will call this person the ‘medical decision maker.’

You may have already acted as someone’s medical decision maker in the past or have been asked to, or may need, to serve that role in the future. In any of these cases, PREPARE for **THEIR** Care has videos covering different topics and resources that can help.”

*If the group is small, this may be a good time to get the group talking and learning from each other. If the group is large, this could take a bit of time, so you may decide to skip. In either case, keep an eye on the clock. Some example questions:*



“Does anyone have any questions or things they would like to share?”

“Did the videos remind you of any personal stories you would like to share with the group?”

*Optional: If no one is talking, you can take a moment to share your own story or example.*

## Play the Video entitled: “About Advance Directive and POLST Forms”



“Next, let’s take a few minutes to watch a video about advance directive legal forms that allow people to name a medical decision maker and to write down their medical wishes.”

Play the video: “About Advance Directive and POLST Forms” (~5 minutes, see **Image 18**).



**Image 17:** “About Medical Planning” video on website



**Image 18:** “About Advance Directive and POLST Forms” video



**“As a reminder, an advance directive is a form that people fill out. A POLST is a physician order that a doctor fills out. They serve different purposes.**

**In an advance directive, a person can name a medical decision maker and write down things that are important for their medical care, including what quality of life means to them. If the person can no longer speak for themselves, this information can be used by family, friends, and the medical care team to help make a range of medical decisions for that person. This form can be used at home and in all medical settings. It can be filled out by anyone at any age or any stage of health.**

**In a POLST form, a doctor will write an order only about resuscitation or whether the person wants CPR or a breathing tube. There is no place to name a medical decision maker. This order can go with the person from the hospital to a nursing home or to the home. This way all the doctors and emergency response teams know what to do if someone's heart were to stop or they were to stop breathing. This form is used for people who are very sick or who may die soon.”**

*Some example questions at the end of the video if there is time:*



**“Does anyone have any questions or things they would like to share?”**



**“Did the videos remind you of any personal stories you would like to share with the group?”**

*Optional: If no one is talking, you can take a moment to share your own story or example.*



**“Next, we will watch the videos in the section “How To Help Other People With Their Medical Planning.”**

**In these videos, you will see stories about all kinds of people and decisions. They are based on real stories from real people, brought to life by actors. These stories are just examples and your situation may be different. The stories you will see in the videos can help, even if your situation may be different.**

**The videos will also show you what you can say, and you can go back and watch them anytime you want at home and even with your family and friends.**

**Some of you may find these videos too slow, while others may find them too fast. Our goal was to find a middle ground that works for most people.”**

*Depending on your audience, you may want to stop and pause the videos more often to allow people to digest the information.*

## Play the Videos from “How to Help Other People with Their Medical Planning”



“We will start with X video (choose from the list below).”

You can find the summary of this video here on the Program Guide called “How to Help Other People With Their Medical Planning” (see **Image 19**, hold up or share screen and show them on the Program Guide).

Play the videos in the section entitled “How To Help Other People With Their Medical Planning” (Part 1):

- **Important Ways Planning is Different for Each Person** (~5 minutes)
- **How to Bring Up the Topic of Medical Planning With Your Family and Friends** (~7 minutes)
- **How To Ask Other People About Their Medical Wishes and Medical Planning** (~7 minutes)
- **How To Help Other People Write Down Their Medical Wishes on an Advance Directive Legal Form** (~5 minutes)
- **BONUS: What To Say if You Learn You Are Not the Decision Maker** (~3 minutes)
- **BONUS: What to Say if You Do Not Want To Be the Decision Maker** (~1 minute)



**Image 19:** “How to Help Other People with Their Medical Planning” videos on website

## After Each Video Ends

Some example questions at the end of each video, if there is time:



“Does anyone have any questions or things they would like to share?”



“Did the videos remind you of any personal stories you would like to share with the group?”

Optional: If no one is talking, you can take a moment to share your own story or example.

Depending on time, you may want to offer your participants a 5-minute break.



“Would anyone like to take a 5-minute break before we go on to the next video?”

## Playing Bonus Videos

You can play additional videos as time permits.

You can ask the audience which videos they are interested in watching and focus on those.

## Step 5. Wrap up & Thank You



“We are now done with watching the videos for today. Before we end today’s session, I wanted to remind you that you can always go back to the PREPARE for **THEIR** Care website to watch the videos on your own. It is free to the public, and you just need a smartphone, tablet, or laptop with internet access. The website URL address is listed on the PREPARE for **THEIR** Care Program Guide that we provided you *[hold up or share screen the Program Guide(s) and point to the URL at the bottom of the front page].*”

### PREPARE for THEIR Care Program Guide



The PREPARE for **THEIR** Care Program Guide named “How To Help Other People With Their Medical Planning” *(hold it up or share screen)* summarizes the information in the PREPARE for **THEIR** Care videos that we watched together today and can help you when your family and friends can still speak for themselves.

### The Other PREPARE for THEIR Care Program Guide *[Optional]*



*If providing the other Program Guide:* “The other Program Guide is about “How To Make Medical Decisions for Other People” *[hold up or share screen the other Program Guide]. We will hand this out now [If in person, pass out the other Program Guide. If virtual, share screen and take a moment to put a link in the chat or let participants know you will email the other Program Guide after the session.]. This part of the PREPARE for **THEIR** Care program can help you when a family member or friend cannot speak for themselves or does not want to. If you are in this situation or find yourself in this situation in the future, these videos may also be helpful to you. They are on the same website, and the website address can be found here.” *[hold up or share screen the Program Guide(s) and point to the URL at the bottom of the front page].**

*Optional: If you are putting on a “How To Make Medical Decisions for Other People” (Part 2) Group Session, now would be a good time to tell them about the day and time of that event.*

### PREPARE for YOUR Care Pamphlet

*If in person, pass out the Pamphlet. If virtual, share screen and take a moment to put a link in the chat or let participants know you will email the Pamphlet after the session.*



“In addition to the Program Guides, we gave you the PREPARE for **YOUR** Care Pamphlet that you can share with family and friends *[hold it up or share screen]. As we saw in the videos, this program helps people have a voice in their OWN medical care and walks them through medical planning step-by-step. The website address for this program is listed on*

**Part 1: How to Help Other People With Their Medical Planning**

the front page. You can use the PREPARE for **YOUR** Care program and this Pamphlet to go through medical planning with your family member or friend to help them do their OWN medical planning.”

**PREPARE Easy-to-Read Advance Directive**

*If in person, pass out the Advance Directive. If virtual, share screen and take a moment to put a link in the chat or let participants know you will email the Advance Directive after the session.*



“When your family member or friend is ready to put their wishes in writing, you can give them or help them fill out the PREPARE Advance Directive. The PREPARE Advance Directive *(hold it up or share screen)* is a legal form that lets people write down their wishes for medical care. I will read the first page of the advance directive so you know about the 3 parts of the form.”

*Read the cover page and Page 1 of the advance directive. If time permits, flip through the pages to read off the titles of each Part of the form and end on the signatures section.*

“To make sure the form can be used and is legal, it needs a signature, the date, and signatures from 2 witnesses or a notary. Please review the requirements on the form, as each US state has its own rules. If you have additional questions about this form, please stay after this session, and I will try to help.”

**Feedback [Optional]****Verbal Feedback**

“Let’s end the session with some feedback. If you are comfortable sharing, please let me know what went well today and what could have been done better. Please give us your honest opinions.”

**Feedback Survey**

“Please help us make the PREPARE Program and these movie events better. Does everyone have a Feedback Survey? *[Hold up or share screen the feedback form]*.”

Please give us your honest opinions with this very brief survey. I will read the questions to the group, and we can fill them out together. Please **DO NOT** put your name on these forms. They are anonymous so we can keep your privacy.”

## **Thank You & End**



**“Thank you so much for joining us today and for providing feedback. We will be here for a few minutes to answer questions or to help with your advance directives.”**

---



## Part 2

# How To Help Make Medical Decisions For Other People

### How To Make Medical Decisions for Other People



When people cannot, or do not want to, speak for themselves



## Group Session Overview for “How To Help Make Medical Decisions For Other People”(Part 2)

Here is a **brief overview** to give you an idea of what to expect when putting on a session **for people who can no longer make their own medical decisions (Part 2; see Image 20).**

**PREPARE for THEIR Care** will help support family members and caregivers in making medical decisions for other people.

For steps and scripts for how to conduct **Part 1**, go to **Page 44.**

**NOTE:** This Toolkit gives you specific steps and scripts for how to conduct **Part 2.** Specific scripts for what to say start on **Page 57.**

**Step 2.** Introduction & Logistics

**Step 3.** Introduce the PREPARE for THEIR Care Program Guide

- How To Make Medical Decisions for Other People Guide (**Part 2**)

- **Download:**

<https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Make-Medical-Decisions-For-Others-English.pdf>

**Step 4.** First, Play the Videos:

- “How To Use PREPARE for THEIR Care”
- “About Advance Directive and POLST Forms”
- Next, Play the Videos You Have Chosen from the Section Entitled: “**How To Make Medical Decisions for Other People**” (**Part 2**)

**Step 5.** Ask about Questions and/or Facilitate Group Discussions

**Step 6.** Wrap Up & Thank You

- Review the PREPARE Handouts
  - How To Make Medical Decisions for Other People Guide (**Part 2**) (Same as above)
  - How To Help Other People With Their Medical Planning Guide (Part 1) (Optional)
    - **Download:** <https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Help-Others-With-Medical-Planning-English.pdf>
  - **PREPARE for YOUR Care Pamphlet**
    - **Download:** <https://prepareforyourcare.org/en/partner-with-prepare/tools-and-handouts/patient-and-caregiver-handouts>
  - Easy-to-Read Advance Directive
    - **Download:** <https://prepareforyourcare.org/en/prepare-for-your-care/advance-directive/advance-directive-welcome>
- Feedback [Optional]



**Image 20:** “How to Help Other People with Their Medical Planning” videos on website

## Scripts of What to Say During “How To Help Make Medical Decisions for Other People” (Part 2)

Reminder to facilitator:

*Italicized gray text = instructions to the facilitator*

This symbol  with **bolded text** = words the facilitator can say

### Step 1. Introductions & Logistics

*Introduce yourself and welcome participants.*



**“We are so excited you could join us today and look forward to learning together. My name is X [and I am from Y organization. With me today are X, Y, and Z co-facilitators].**

**This session is about supporting you as you make medical decisions for other people.**

**Some people may have already planned ahead and made decisions about their medical care. They may have talked about their wishes with you, the medical decision makers they have chosen, their medical care team, and other family and friends. They may also have written down the name of their medical decision maker and medical wishes on a form. This process is called medical planning or advance care planning. Medical planning helps people have a voice in their health care.**

**When making medical decisions for other people, it is important to find out about their wishes for medical care that they have talked about or written down in a form. These forms may include:**

- **An advance directive**
- **A durable power of attorney for health care**
- **A living will**
- **Physician Orders for Life-Sustaining Treatment (POLST, MOLST)**

**These legal forms let people have a say about how they want to be cared for if they cannot speak for themselves. Some forms also allow people to write down the name of a medical decision maker(s) as well as their medical wishes.**

**Finding out about a person’s prior medical planning can help you make decisions for the person when they cannot, or do not want to, speak for themselves.**

**Some people may have never talked about or written down their medical wishes. This is okay.**

This program will help you make medical decisions for other people.

Let's get started. Today, we will be watching some of the PREPARE For **THEIR** Care videos and then talk about them as a group if people feel comfortable. The program will show you how to make medical decisions for other people. This program may take 60 to 90 minutes, depending on how many videos we want to watch and how much conversation we have as a group. If you need to leave early, please feel free to do so."

## Cell phones



"We ask that you please turn off your cell phones and ideally put them away so we stay focused."

## Facilities



For In-Person Sessions:



"The bathrooms are *[down the hall, etc.]*. Please feel free to get up and use the bathroom whenever you want."

## Cameras, Chat, and Mute Button



For Online Sessions



**Cameras and chat:** "If you feel comfortable and are able to, please turn on your camera. I would like to see who I am talking to, and it will help me gauge the room, etc. Also, if you feel shy or don't want to speak, you can use the chat to ask questions or comments."



**Mute button:** "Please turn off your microphone with the "mute" button when you are not speaking. This helps us get rid of background sounds that might distract us."

## Emotions and Feelings



"We understand that this topic, along with the videos and stories, may remind you of difficult personal experiences and bring up strong emotions. Please feel free to step out and take a break if needed."

## Confidentiality



“People in our group may also talk about personal experiences. I would also like to ask each of you to respect your fellow participants and keep any personal information shared here confidential and within this group. Can I get a verbal “yes” from each of you, saying that you agree to keep all personal information discussed today private? Thank you.”

## Ice Breaker Questions *[Optional]*

### Option #1: Show of Hands *[Optional]*



“By show of hands [or virtual hands]... *(pick one example from below or come up with your own)*

- How many of you have heard of medical planning or advance care planning before?
- How many of you have had experience making medical decisions for other people?
- How many of you have never had experience making medical decisions for other people?
- Is anyone interested in learning how to put on one of these group events in the future? (Great, please see us after the session)

### Option #2: Group Introductions *[Optional]*

*Group size will vary. Depending on the group size and the time you have, you may ask people to introduce themselves and briefly share what they hope to gain from the event.*



“For introductions, we would like to go around the room and ask for your first name only if you feel comfortable sharing. It would also be helpful to know what you hope to get out of the event today. We only have a few minutes, so I will ask you to be brief. Not everyone feels comfortable speaking in a group setting. If we get to you and you do not want to share, you can say PASS. I will go first. Again, my name is X, and I hope to *[e.g., learn new things from our group discussion today]*.”

### Option #3: Sharing Your Story *[Optional]*

*If you feel comfortable, it can be helpful for you as the facilitator to share a personal story that illustrates why getting people to do their medical planning is so important and/or why you are leading a group today. Sharing a brief story at the beginning is a good way to build trust and help people feel safe sharing their own stories. Examples:*

- *National Healthcare Decisions Day, Re-Imagine or other*
- *Personal stories about a family member or a friend: ~ This is how medical planning helped them and their family/friends*
- *Personal stories in your line of work, etc. Example: “As a social worker or case manager...”*

## Step 2. Introduce the PREPARE for THEIR Care Program Guide

*If in person, pass out the Program Guide. If virtual, share screen and take a moment to put a link in the chat or let participants know you will email the Program Guide after the session.*



“I want to take a moment to introduce a handout that we will use while watching the videos. There will be more handouts that we will give you at the very end of the session.

The PREPARE for **THEIR** Care Program Guide is about “How to Make Medical Decisions for Other People” and can help you when a family member or friend cannot, or does not want to, speak for themselves. This Guide summarizes the information in the videos we will be watching together today.

During our session, before we watch a video, I will point to this Guide where you can find the summary of that video. That way, after you watch the video, you will also have a written reminder of the information in the video that you can take home with you.

We will only get to some of the videos in this section today, but you can visit the PREPARE for **THEIR** Care website on your own to watch any of the videos at any time. The website URL is listed at the bottom of the front page of the Program Guide (*hold it up or share screen*).”

## Step 3-4. Play the PREPARE for THEIR Care Videos & Ask About Questions and/or Facilitate Group Discussion



“Now we will watch the videos. It is OK if these topics are new to you. PREPARE for **THEIR** Care will walk you through it step-by-step. We hope that all of you will get some helpful information today from the PREPARE for **THEIR** Care videos and each other.

At the end of each video, I will ask if people have any questions or want to discuss what we just watched. I will also check to see if we need a short break.”

### Play the Video entitled: “How To Use PREPARE for THEIR Care”



“Let’s begin with a video that introduces the PREPARE for **THEIR** Care program and how to use it.”

*Show the video “How to Use PREPARE for THEIR Care” (~8 minutes, see **Image 21**).*

*When you start playing the video, ask if everyone can hear to make sure all participants can see and hear the video.*



**Image 21:** “How To Use PREPARE for THEIR Care” video on website

## Play the Video entitled: “About Advance Directive and POLST Forms”



“First, let’s take a few minutes to watch a video about advance directive legal forms that allow people to name a medical decision maker and to write down their medical wishes.”

*Show the video: “About Advance Directive and POLST Forms” (~5 minutes, see Image 22)*



“As a reminder, an advance directive is a form that people fill out. A POLST is a physician order that a doctor fills out. They serve different purposes.

In an advance directive, a person can name a medical decision maker and write down things that are important for their medical care, including what quality of life means to them. If the person can no longer speak for themselves, this information can be used by family, friends, and the medical care team to help make a range of medical decisions for that person. This form can be used at home and in all medical settings. It can be filled out by anyone at any age or any stage of health.

In a POLST form, a doctor will write an order only about resuscitation or whether the person wants CPR or a breathing tube. There is no place to name a medical decision maker. This order can go with the person from the hospital to a nursing home or to the home. This way all the doctors and emergency response teams know what to do if someone's heart were to stop or they were to stop breathing. This form is used for people who are very sick or who may die soon.”

*If there is time:*



“Does anyone have any questions or things they would like to share?”



“Did the videos remind you of any personal stories you would like to share with the group?”

*Optional: If no one is talking, you can take a moment to share your own story or example.*



**Image 22:** “About Advance Directive and POLST Forms” video on website



“Today, we will watch the videos in the section “How To Make Medical Decisions for Other People.”

In these videos, you will see stories about all kinds of people and decisions. They are based on real stories from real people, brought to life by actors. These stories are just examples and your situation may be different. The stories you will see in the videos can help, even if your situation may be different.

The videos will also show you what you can say, and you can go back and watch them anytime you want at home and even with your family and friends.



Some of you may find these videos too slow, while others may find them too fast. Our goal was to find a middle ground that works for most people.”

*Depending on your audience, you may want to stop and pause the videos more often to allow people to digest the information.*

## Play the Videos from “How To Make Medical Decisions for Other People”



“We will start with X video *(choose from the list below)*.

You can find the summary of this video here on the Program Guide called “How To Make Medical Decisions for Other People” (see **Image 23**, hold up or share screen and show them on the Program Guide).

*Play the videos in the section entitled “How To Make Medical Decisions for Other People” (Part 2):*

- How To Make Medical Decisions for Other People
- How to Ask the Medical Care Team Questions (~9 min)
- How To Make Medical Decisions for Other People (~12 minutes)
- How To Talk About Decisions You Made for Others (~10 minutes)
- Advice From Other Medical Decision Makers (~7 minutes)
- **BONUS:** How To Help Even if You Are Not the Decision Maker (~4 minutes)
- **BONUS:** How to Ask Someone Else to Be the Decision Maker (~2 minutes)
- **BONUS:** What To Do When Families Do Not Agree (~6 minutes)

### How To Make Medical Decisions for Other People



When people cannot, or do not want to, speak for themselves

**Image 23:** “How To Make Medical Decisions for Other People” videos on website

## After Each Video Ends

*Some example questions at the end of each video:*



“Does anyone have any questions or things they would like to share?”



“Did the videos remind you of any personal stories you would like to share with the group?”

*Optional: If no one is talking, you can take a moment to share your own story or example.*

*Depending on time, you may want to offer your participants a 5-minute break.*



“Would anyone like to take a 5-minute break before we go on to the next video?”

## Playing Bonus Videos

*You can play additional videos as time permits.*

*You can ask the audience which videos they are interested in watching and focus on those.*

## Step 5. Wrap up & Thank You



“We are now done with watching the videos for today. Before we end today’s session, I wanted to remind you that you can always go back to the PREPARE for **THEIR** Care website to watch the videos on your own. It is free to the public, and you just need a smartphone, tablet, or laptop with internet access. The website URL address is listed on the PREPARE for **THEIR** Care Program Guide that we provided you *[hold up or share screen the Program Guide(s) and point to the URL at the bottom of the front page].*”

### PREPARE for THEIR Care Program Guide



The PREPARE for **THEIR** Care Program Guide named “How To Make Medical Decisions for Other People” *(hold it up or share screen)* summarizes the information in the PREPARE for **THEIR** Care videos that we watched together today and can help you when a family member or friend cannot, or does not want to, speak for themselves.”

### The Other PREPARE for THEIR Care Program Guide *[Optional]*



*If providing the other Program Guide:* “The other Program Guide is about “How To Help Other People With Their Medical Planning” *[hold up or share screen the other Program Guide]. We will hand this out now [If in person, pass out the other Program Guide. If virtual, share screen and take a moment to put a link in the chat or let participants know you will email the other Program Guide after the session.]. This part of the PREPARE for **THEIR** Care program can help support you when your family and friends can still speak for themselves. If you have been asked to, or may need, to serve as a medical decision maker for someone else in the future, these videos may also be helpful to you. They are on the same website, and the website address can be found here.” *[hold up or share screen the Program Guide(s) and point to the URL at the bottom of the front page].**

*Optional: If you are putting on a “How To Help Other People with Their Medical Planning” Group Session (**Part 1**), now would be a good time to tell them about the day and time of that event.*



## PREPARE for **YOUR** Care Pamphlet

*If in person, pass out the Pamphlet. If virtual, share screen and take a moment to put a link in the chat or let participants know you will email the Pamphlet after the session.*



“Even though you joined our session today to learn how to make medical decisions for other people, we often find that this encourages people to do their OWN medical planning or help other people in their lives with medical planning. We have provided you with a few resources that may help you or your other family members.

In addition to the Program Guides, we gave you the PREPARE for **YOUR** Care Pamphlet that you can share with family and friends *[hold it up or share screen]*. As we saw in the videos, this program is another resource that helps people have a voice in their OWN medical care and walks them through their OWN medical planning step-by-step. The Pamphlet has brief notes about the 5 steps of that program.

The PREPARE for **YOUR** Care website address is on the front page so you and your family and friends can visit the website. You and your family and friends can also visit the PREPARE for **YOUR** Care website together.”

## PREPARE Easy-to-Read Advance Directive

*If in person, pass out the Advance Directive. If virtual, share screen and take a moment to put a link in the chat or let participants know you will email the Advance Directive after the session*



“When you or your family and friends are ready to put wishes into writing, you can use the PREPARE easy-to-read advance directive *[hold it up or share screen]*. This is a legal form that allows people to write down their medical wishes.

I will read the first page of the advance directive so you know about the 3 parts of the form.”

*Show participants the AD. At the very least, read page 1 of the AD to orient them to the 3 parts of the form. If time permits (this is not likely), you can flip through the pages and walk them through the advance directive form section by section (Part 1, Part 2, and Part 3).*



“To make sure the form can be used and is legal, it needs a signature, the date, and signatures from 2 witnesses or a notary. Please review the requirements on the form, as each US state has its own rules.

If you have additional questions about this form or any of the other materials, please stay after this session, and I will try to help.”

## Feedback *[Optional]*

### Verbal Feedback



“Let’s end the session with some feedback. If you are comfortable sharing, please let me know what went well today and what could have been done better. Please give us your honest opinions.”

### Feedback Survey



“Please help us make the PREPARE Program and these movie events better. Does everyone have a Feedback Survey? *[Hold up or share screen the feedback form].*”

Please give us your honest opinions with this very brief survey. I will read the questions to the group, and we can fill them out together. Please **DO NOT** put your name on these forms. They are anonymous so we can keep your privacy.”

## Thank You & End



“Thank you so much for joining us today and for providing feedback. We will be here for a few minutes to answer questions or to help with your advance directives.”

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## APPENDICES

- Appendix 1.** [Sample Promotional Blurbs, Emails, and Flyers if Using “How to Help Other People with Their Medical Planning” \(Part 1\)](#), **Page 61**
- Appendix 2.** [Sample Promotional Blurbs, Emails, and Flyers if Using “How to Make Medical Decisions for Other People” \(Part 2\)](#), **Page 65**
- Appendix 3.** [Validated Questions to Ask Participants Before and After](#), **Page 69**
- Appendix 4.** [Participant Feedback Survey](#), **Page 74**
- Appendix 5.** [Email Reminder for Online Session for “How to Help Other People with Their Medical Planning” \(Part 1\) Template](#), **Page 76**
- Appendix 6.** [Email Reminder for Online Session for “How to Make Medical Decisions for Other People” \(Part 2\) Template](#), **Page 78**



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## Appendix 1:

### Sample Promotional Blurbs, Emails, and Flyers if Using “How to Help Other People with Their Medical Planning” (Part 1)

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## Newsletter Blurb

We are hosting an important [in-person, online] group session at the (NAME OF CENTER) that can help you **PREPARE for THEIR Care**.

The **PREPARE for THEIR Care** program has videos and stories to help you.

At our **PREPARE for THEIR Care** [in-person, online] group session, we will watch a series of short videos about how to help other people with their medical planning.

We are hosting the **PREPARE for THEIR Care** [in-person, online] group session on (DATE, TIME, LOCATION/ VIA VIDEOCONFERENCING PLATFORM). Spots are limited, so please R.S.V.P. to (NAME). This event is free.



## Email / E-blast

Dear Member,

**Would you like to help someone in your life with their medical planning?**

We are hosting an important [in-person, online] group session at the (NAME OF CENTER) that can support you and help you **PREPARE for THEIR Care**.

**PREPARE for THEIR Care** will show you how to help other people who can still make their own decisions with their medical planning.

Medical planning may involve:

- naming a trusted person who can speak for them in case of an emergency
- deciding what is most important for their quality of life and health care

We will watch a series of videos that will talk about how to help other people with their medical planning. You will also learn about free, easy-to-use tools from the [PREPAREforYourCare.org](https://PREPAREforYourCare.org) website.

Everyone is welcome and this event is free.

Please feel free to bring your family and friends.

(DATE AND TIME)  
(EXACT LOCATION/VIA VIDEOCONFERENCING PLATFORM)  
R.S.V.P. by (DATE)



## **Submission for Community Calendar, local paper, etc.**

**PREPARE for THEIR Care:** (NAME OF CENTER) is hosting a free [in-person, online] group session to support people with helping other people with their medical planning. Short videos will show people how to [help others with medical planning/make medical decisions for other people].  
(DATE, TIME, R.S.V.P. INFO)




## **Social Media Post**

Join us for a session at (NAME OF CENTER) to gear up for Caregiving!

The PREPARE for THEIR Care program has videos and stories about how to help other people with their medical planning.

At our upcoming [in-person or online] session, we'll play these videos to empower you in [helping others with medical planning/making medical decisions for your loved ones].

 Save the Date: (DATE)

 Time: (TIME)

 Location: (LOCATION/Via Video Conferencing Platform)

Spaces are limited, RSVP to (NAME) now. Don't miss out on this FREE event!  
#PrepareForTheirCare #Caregiving



# **PREPARE<sup>TM</sup>** **for THEIR care**

## **Join us for a FREE [in-person, online] group session**

**Come watch video stories that will support you as  
you help other people with their medical planning**

[www.PREPAREforTHEIRcare.org](http://www.PREPAREforTHEIRcare.org)



**Where:**

**Date:**

**Time:**



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## Appendix 2:

### Sample Promotional Blurbs, Emails, and Flyers if Using “How to Make Medical Decisions for Other People” (Part 2)

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## Newsletter Blurb

We are hosting an important [in-person, online] group session at the (NAME OF CENTER) that can help you **PREPARE for THEIR Care**.

The **PREPARE for THEIR Care** program has videos and stories to help you.

At our **PREPARE for THEIR Care** [in-person, online] group session, we will watch a series of short videos that will talk about how to make medical decisions for other people.

We are hosting the **PREPARE for THEIR Care** [in-person, online] group session on (DATE, TIME, LOCATION/ VIA VIDEO CONFERENCE PLATFORM). Spots are limited, so please R.S.V.P. to (NAME). This event is free.



## Email / E-blast

Dear Member,

**Do you need to make medical decisions for someone else, or may need to in the future?**

We are hosting an important [in-person, online] group session at the (NAME OF CENTER) that can support you and help you **PREPARE for THEIR Care**.

**PREPARE for THEIR Care** will show you how to make medical decisions for other people who can no longer make their own decisions.

Medical planning may involve:

- naming a trusted person who can speak for them in case of an emergency
- deciding what is most important for their quality of life and health care

We will watch a series of videos that will talk about how to make medical decisions for other people. You will also learn about free, easy-to-use tools from the [PREPAREforYourCare.org](https://PREPAREforYourCare.org) website.

Everyone is welcome and this event is free.

Please feel free to bring your family and friends.

(DATE AND TIME)  
(EXACT LOCATION)  
R.S.V.P. by (DATE)



## **Submission for Community Calendar, local paper, etc.**

**PREPARE for THEIR Care:** (CENTER NAME) is hosting a free [in-person, online] group session to support people with making medical decisions for other people. Short videos will show people how to [help others with medical planning/make medical decisions for other people]. (DATE, TIME, R.S.V.P. INFO)




## **Social Media Post**

Join us for a session at (NAME OF CENTER) to gear up for Caregiving!

The PREPARE for THEIR Care program has videos and stories about how to help other people with their medical planning.

At our upcoming [in-person or online] session, we'll play these videos to empower you in [helping others with medical planning/making medical decisions for your loved ones].

 Save the Date: (DATE)

 Time: (TIME)

 Location: (LOCATION/Via Video Conferencing Platform)

Spaces are limited, RSVP to (NAME) now. Don't miss out on this FREE event!  
#PrepareForTheirCare #Caregiving



# **PREPARE<sup>TM</sup>** **for THEIR care**

**Join us for a FREE [in-person,  
online] group session**

**Come watch video stories that will support you as  
you help make medical decisions for other people.**

[www.PREPAREforTHEIRcare.org](http://www.PREPAREforTHEIRcare.org)



**Where:**

**Date:**

**Time:**



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## Appendix 3:

### Validated Questions to Ask Participants Before and After

Continue onto the next page

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## Optional: Validated Questions to Ask Participants Before and After the Event

Your answers to these questions will help us understand what you took away from today's group session. Please answer the questions below as honestly as you can.

You are being asked to complete this survey because you are a friend or family member of someone who may need your help making medical decisions in the future.

A substitute decision maker is someone who can make medical decisions for another person if that person is not capable of making their own medical decisions. A substitute decision maker is also sometimes called a health care proxy or a surrogate decision maker.

Over the following 6 questions, we will be asking you about how confident and ready you feel to make medical decisions for a family member or friend if they become unable to speak for themselves. Please think about your closest family member or friend.

You may already have experience making medical decisions for a friend or family member. That is OK. Try to answer as honestly as you can.

The first 3 questions are about how confident you feel today to do certain tasks.

1. How confident are you that you could talk to your family member or friend about the kind of medical care they would want if they were very sick or near the end of life?

Not at all	A little	Somewhat	Fairly	Extremely
------------	----------	----------	--------	-----------

Mark here if this question does not apply because this person is not able to make medical decisions

2. How confident are you that you could talk with your family member or friend's DOCTORS about the care they would want if they were very sick or near the end of life?

Not at all	A little	Somewhat	Fairly	Extremely
------------	----------	----------	--------	-----------

3. How confident are you that today you could make medical decisions for your family member or friend if they were unable to speak for themselves?

Not at all	A little	Somewhat	Fairly	Extremely
------------	----------	----------	--------	-----------

The following 3 questions are about how ready you feel today to do certain tasks.

4. How ready are you to talk to your family member or friend about the kind of medical care they would want if they were very sick or near the end of life?

Not at all	A little	Somewhat	Fairly	Extremely
------------	----------	----------	--------	-----------

Mark here if this question does not apply because this person is not able to make medical decisions

5. If needed, how ready are you to talk with your family member or friend's DOCTOR about the kind of medical care they would want if they were very sick or near the end of life?

Not at all	A little	Somewhat	Fairly	Extremely
------------	----------	----------	--------	-----------

6. If needed, how ready are you to make medical decisions for your family member or friend if they were unable to speak for themselves?

Not at all	A little	Somewhat	Fairly	Extremely
------------	----------	----------	--------	-----------

**We will now ask you about your OWN experiences and opinions about medical planning. We may ask you about things that you have already done or have not thought about at all. Please try to answer as honestly as you can. There are no right or wrong answers.**

### **1. Medical Decision Makers, or Surrogates**

**This question asks about medical decision makers or a family member or friend who can make decisions for you if you were to become too sick to make your own decisions.**

#### **1. How ready are you to sign OFFICIAL PAPERS naming a person or group of people to make medical decisions for you?**

- a. I have never thought about it
- b. I have thought about it, but I am not ready to do it
- c. I am thinking about doing it in the next 6 months
- d. I am definitely planning to do it in the next 30 days
- e. I have already done it

### **2. Deciding what matters most in life**

**The following few questions are about specific medical treatments that people may or may not want if they were very sick or at the end of their life.**

**For instance, some people know they would want to be on a breathing machine. Other people know they would never want to be on a breathing machine.**

**Please give us your honest opinions. There are no right or wrong answers.**

#### **2. How ready are you to talk to your MEDICAL DECISION MAKER about the kind of medical care you would want if you were very sick or near the end of life?**

- a. I have never thought about it
- b. I have thought about it, but I am not ready to do it
- c. I am thinking about doing it in the next 6 months

- d. I am definitely planning to do it in the next 30 days
- e. I have already done it

**3. How ready are you to talk to your DOCTOR about the kind of medical care you would want if you were very sick or near the end of life?**

- a. I have never thought about it
- b. I have thought about it, but I am not ready to do it
- c. I am thinking about doing it over the next few visits
- d. I am definitely planning to do it at the next visit
- e. I have already done it

**4. How ready are you to SIGN OFFICIAL PAPERS putting your wishes in writing about the kind of medical care you would want if you were very sick or near the end of life?**

- a. I have never thought about it
- b. I have thought about it, but I am not ready to do it
- c. I am thinking about doing it in the next 6 months
- d. I am definitely planning to do it in the next 30 days
- e. I have already done it



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## **Appendix 4:**

### **Participant Feedback Survey**

Continue onto the next page

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## OPTIONAL: Feedback Survey

Your feedback will help us make PREPARE and this event better. Please answer the questions below and hand in this form before you leave today! THANK YOU!

LOCATION OF TODAY'S PREPARE group session:

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Check the box below your preferred response.

### 1. The videos and materials were easy to understand.

☐ STRONGLY DISAGREE      ☐ DISAGREE      ☐ I have no opinion      ☐ AGREE      ☐ STRONGLY AGREE

### 2. I would recommend this session to a friend or family member.

☐ STRONGLY DISAGREE      ☐ DISAGREE      ☐ I have no opinion      ☐ AGREE      ☐ STRONGLY AGREE

### 3. Do you have any suggestions for how we can make this event or the PREPARE videos or materials better?

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## **Appendix 5:**

### **Email Reminder for Online Session for “How to Help Other People with Their Medical Planning” (Part 1) Template**

Continue onto the next page for email template

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**Subject: Join Our Online Meeting: [Meeting Name] on [Date] at [Time]**

Hello [PARTICIPANT NAME],

I hope your calendar is marked for [Meeting Name]. Here are the details you will need:

Date: [Date]

Time: [Time]

Virtual Platform: [Platform Name]

Meeting Link: [Link]

We will be watching video stories that will support you as you help other people make medical decisions for other people, or if you have to make medical decisions for other people.

In preparation for the session, you should have received some materials [via email, attached here, via mail, etc.]. We will be referring to these during the session.

- **How To Help Other People With Their Medical Planning Guide**

You can download the PREPARE Guide here: <https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Help-Others-With-Medical-Planning-English.pdf>

- **The PREPARE for **YOUR** Care Pamphlet**

You can download the PREPARE Pamphlet here: <https://prepareforyourcare.org/en/partner-with-prepare/tools-and-handouts/patient-and-caregiver-handouts>

- **The PREPARE easy-to-read Advance Directive**

[NOTE: PLEASE USE THE APPROPRIATE STATE-SPECIFIC ADVANCE DIRECTIVE FOR THE STATE OF YOUR PARTICIPANTS].

You can download the Advance Directive here: <https://prepareforyourcare.org/en/prepare-for-your-care/advance-directive/advance-directive-welcome>

- **How To Make Medical Decisions for Other People Guide (Optional)**

You can download the PREPARE Guide here: <https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Make-Medical-Decisions-For-Others-English.pdf>

If you have any questions about this meeting, please don't hesitate to call me at [ADD PHONE NUMBER]

All the best,

[ADD YOUR NAME AND ORGANIZATION NAME]

---

## **Appendix 6:**

### **Email Reminder for Online Session for “How to Make Medical Decisions for Other People” (Part 2) Template**

Continue onto the next page for email template

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**Subject: Join Our Online Meeting: [Meeting Name] on [Date] at [Time]**

Hello [PARTICIPANT NAME],

I hope your calendar is marked for [Meeting Name]. Here are the details you will need:

Date: [Date]

Time: [Time]

Virtual Platform: [Platform Name]

Meeting Link: [Link]

We will be watching video stories that will support you as you help other people make medical decisions for other people, or if you have to make medical decisions for other people.

In preparation for the session, you should have received some materials [via email, attached here, via mail, etc.]. We will be referring to these during the session.

- **How To Make Medical Decisions for Other People Guide**

You can download the PREPARE Guide here: <https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Make-Medical-Decisions-For-Others-English.pdf>

- **The PREPARE for **YOUR** Care Pamphlet**

You can download the PREPARE Pamphlet here: <https://prepareforyourcare.org/en/partner-with-prepare/tools-and-handouts/patient-and-caregiver-handouts>

- **The PREPARE easy-to-read Advance Directive**

[NOTE: PLEASE USE THE APPROPRIATE STATE-SPECIFIC ADVANCE DIRECTIVE FOR THE STATE OF YOUR PARTICIPANTS].

You can download the Advance Directive here: <https://prepareforyourcare.org/en/prepare-for-your-care/advance-directive/advance-directive-welcome>

- **How To Help Other People With Their Medical Planning Guide** (Optional)

You can download the PREPARE Guide here: <https://prepareforyourcare.org/uploads/PFTC-Pamphlet-Help-Others-With-Medical-Planning-English.pdf>

If you have any questions about this meeting, please don't hesitate to call me at [ADD PHONE NUMBER]

All the best,

[ADD YOUR NAME AND ORGANIZATION NAME]