A Gift to Your Family

agifttoyourfamily.org

Guide to Hosting Pro Bono Advance Care Planning

WORKSHOPS
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Introduction

The North Carolina Bar Association is pleased to introduce its new pro bono project, “A Gift to Your Family.” This project is a collaboration of the Health Law and Elder Law sections of the NCBA and the NC Partnership for Compassionate Care (a program of the NC Medical Society Foundation). Together, these organizations bring you the tools, resources and support you need to host an advance care planning workshop.

This project is designed to pair local attorneys with community partners and health care providers to collaboratively host workshops to educate and assist members of the public with advance care planning conversations, including completion of Health Care Power of Attorney documents and living wills. As you may know, the process of advance care planning, including the completion of advance directives, allows individuals to state their preferences about medical treatment and to name someone they trust to make health care decisions for them if they ever become unable to speak for themselves. The workshop will not address financial issues, estate planning or General Power of Attorney documents.

Pilot workshops were held in January 2015 in Durham and in April 2015 in Asheville, Gastonia, Manteo, Wilmington and Winston-Salem. These workshops were a tremendous success. Ultimately, we hope to have workshops in all 100 counties twice a year – in April to help promote National Healthcare Decisions Day and in November to coincide with National Hospice and Palliative Care Month.

The purpose of this guide is to provide you with all the materials you may need, including how to access online training for volunteer attorneys.
NC Partnership for Compassionate Care

*The NC Partnership for Compassionate Care (NCPCC) is a program of the NC Medical Society Foundation*

The mission of the NC Partnership for Compassionate Care is to ensure that patients’ end-of-life treatment choices are openly discussed, documented, and honored. Our aim is to provide educational resources to the community and health care professionals to improve the quality of care at the end of life.

NCPCC’s seven regional coalitions are made up of individuals with an interest in end-of-life matters. Regional coalitions are composed of hospital and palliative care providers, faith community leaders, social workers, EMS providers, long-term care providers, hospital ethics committee members, and other volunteers. These coalitions are charged with developing integrated initiatives specifically tailored to meet the needs of regional and local populations—drawing upon resources developed by the subject matter task forces.

To find NCPCC regional coalition members in your area and access their contact information, visit [http://goo.gl/JliJBA](http://goo.gl/JliJBA).
Roles and Responsibilities

The goal of this project is to connect local attorneys with community partners that already provide advance care planning services. Together, these groups will partner to assist clients in understanding and completing advance directive documents.

Attorneys:

• The primary role of the attorneys is to counsel individual clients regarding the choices outlined in the advance directive document.
  • There needs to be **at least one lead attorney** who is willing to organize and recruit other attorneys to volunteer at the workshop.
    ○ If you need help finding a lead attorney in your area, please contact Ken Burgess or Aimee Smith:
      ▪ Ken Burgess: kburgess@poynerspruill.com or 919-783-2917.
      ▪ Aimee Smith: asmith@craigejenkins.com or 336-725-0583

Community Partners:

• The primary role of the community partner is to handle the logistics related to the event, such as:
  ○ Securing a location
  ○ Recruiting health care providers to participate
  ○ Coordinating the details related to hosting a workshop
  • There needs to be **at least one lead community partner** who is willing to work with the lead attorney to plan the event and recruit the necessary volunteers.
    ○ The NC Partnership for Compassionate Care has seven regional coalitions across the state with expertise, resources and contacts in the field of advance care planning.
      ▪ We recommend that you contact leaders in your region to assist with the event. To find NCPCC regional coalition members in your area, visit [http://goo.gl/JliJBA](http://goo.gl/JliJBA).
    ○ Other potential community partners to consider:
      ▪ Hospitals
      ▪ Medical clinics
      ▪ Long-term care facilities
      ▪ Senior Services
      ▪ Hospices
      ▪ Religious organizations
Scheduling your Workshop

The lead attorney and the lead community partner will need to determine the time, location and format of the event.

**Time:**
- The goal is to host these workshops in:
  - *November* – to coincide with National Hospice and Palliative Care Month.
- Carefully consider the day and time to maximize participation of volunteers and attendance of participants.

**Location:**
- The location of the workshop is incredibly important. The following factors should be considered in choosing a location:
  - Proximity to public transportation
  - General accessibility
  - Handicap accessibility
  - Parking availability
- **Expenses:**
  - Does your venue charge a fee?
  - There may be locations that will allow you to host this event for free, such as a church fellowship hall or senior center. This also could be a great way to get both volunteers and participants.

**Format:**
- Decide if you will do walk-ins, appointments or a combination.
  - How will you structure the day?
  - Below are two examples of how the pilot workshops were structured. You should determine what best fits the needs of your volunteers and participants.
    - Appointments every 30 minutes (with walk-ins welcome), with participants watching a video and/or listening to a speaker/panel for the first part and then meeting with individual attorneys
    - Appointments every hour, with a larger number of individuals showing up at the same time to watch a video and/or listen to a speaker or panel for the first part before meeting with individual attorneys (walk-ins still welcome, but may need one-on-one conversations if they miss the “talk” at the beginning)
  - Here are a few videos that you might consider using at your workshop:
    - “Imagine” video: [https://youtu.be/BarOqZTUGdw](https://youtu.be/BarOqZTUGdw)
    - “Aint the Way to Die” video: [https://youtu.be/NAInRHicgWs](https://youtu.be/NAInRHicgWs)
Event Planning Checklist

This checklist outlines the main tasks necessary to help your event run more smoothly. It may be adjusted to fit your needs.

### JOINT ASSIGNMENTS

<table>
<thead>
<tr>
<th>Event Planning Assignments</th>
<th>Person(s) Responsible</th>
<th>Status</th>
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<tbody>
<tr>
<td>Determine event date, time and location</td>
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<td>Develop a budget</td>
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### ATTORNEY ASSIGNMENTS

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<th>Event Planning Assignments</th>
<th>Person(s) Responsible</th>
<th>Status</th>
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<tbody>
<tr>
<td>Register your event with NCBA by emailing Andi Bradford at <a href="mailto:abradford@ncbar.org">abradford@ncbar.org</a></td>
<td></td>
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<tr>
<td>Recruit volunteer attorneys</td>
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<tr>
<td>Train volunteer attorneys</td>
<td></td>
<td></td>
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<tr>
<td>Secure expert attorney to attend event</td>
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<td></td>
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<tr>
<td>Finalize volunteer schedule &amp; tasks for event</td>
<td></td>
<td></td>
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<tr>
<td>Send reminders to volunteer attorneys</td>
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**After Event**

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<thead>
<tr>
<th>Event Planning Assignments</th>
<th>Person(s) Responsible</th>
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<tbody>
<tr>
<td>Send completed NCBA Pro Bono Activities Forms to Kim Bart Mulliken at <a href="mailto:kbartmullikin@ncbar.org">kbartmullikin@ncbar.org</a></td>
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### COMMUNITY PARTNER ASSIGNMENTS

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<th>Event Planning Assignments</th>
<th>Person(s) Responsible</th>
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<tr>
<td>Reserve event location</td>
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<tr>
<td>Recruit volunteers</td>
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**Publicize Event**

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<th>Event Planning Assignments</th>
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<tr>
<td>Develop marketing plan</td>
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<tr>
<td>Copy/print flyers and posters – template available (If you use a different flyer, you MUST send to <a href="mailto:abradford@ncbar.org">abradford@ncbar.org</a> for approval.)</td>
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<tr>
<td>Send workshop information to Russell Rawlings at <a href="mailto:rrawlings@ncbar.org">rrawlings@ncbar.org</a> – request he put event information on eBar</td>
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<tr>
<td>Send workshop information to Melanie Phelps (with NCPCC) at <a href="mailto:mphelps@ncmedsoc.org">mphelps@ncmedsoc.org</a> – request she put event information on NCPCC website</td>
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<tr>
<td>Event Planning Assignments</td>
<td>Person(s) Responsible</td>
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<td>Send workshop information to Lauren Benbow (with the NC Department of the Secretary of State) at <a href="mailto:lbenbow@sosnc.com">lbenbow@sosnc.com</a> or (919) 807-2166 to invite her to your workshop. <em>She will be able to provide information about the NC Advance Directives Registry.</em></td>
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<tr>
<td>Post event in newsletters and/or on website and social media</td>
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<tr>
<td>Develop and distribute PR or press kit from materials available (for press release examples, see Appendix I &amp; Appendix J)</td>
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<td>Distribute event flyers/posters/mailing</td>
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<tr>
<td>Arrange media interview with local expert – newspaper, radio and/or TV</td>
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**Coordinate Events for the Day of Workshop**

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<th>Event Planning Assignments</th>
<th>Person(s) Responsible</th>
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<tbody>
<tr>
<td>Rent chairs, tables, projector or other equipment (if needed)</td>
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<td>Request materials (if needed – see “Materials”)</td>
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<tr>
<td>Draft room layout</td>
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<td>Review AV needs &amp; confirm reservations</td>
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<td>Print handouts &amp; forms</td>
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<tr>
<td>Print badges and/or get nametags</td>
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<tr>
<td>Make parking signs, signs to direct attendees to event location/room, etc.</td>
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<tr>
<td>Finalize volunteer schedule &amp; tasks for event</td>
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<tr>
<td>Confirm with volunteers</td>
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<tr>
<td>Hold an info session to educate volunteers (if needed)</td>
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<tr>
<td>Set up event location, registration area, put up signs</td>
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**After Event**

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<th>Event Planning Assignments</th>
<th>Person(s) Responsible</th>
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<tbody>
<tr>
<td>Summarize participant feedback forms &amp; media coverage</td>
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Attorney Responsibilities

Registering Event with NCBA: As soon as you have a date and location confirmed, please e-mail Andi Bradford at abradford@ncbar.org.

Recruiting Attorney Volunteers: See Appendix A for a sample communication to send to your local bar association. See Appendix B for a sample e-mail communications to the volunteer attorneys.

Training Attorneys: There are several available options for training attorneys to participate in the pro bono workshops.

• Online On-Demand CLE: “A Gift to Your Family” – this is an OPTIONAL 1 hour and 45 minute CLE that provides training on how to assist clients with completing advance directives. The cost is $50. Access the training here: http://goo.gl/pRVqFR.

• Written Materials: All of the written materials that accompany the online CLE training (with the exception of the PowerPoint presentations) are available for free to any attorney who participates in this project. Access the written materials here: https://www.dropbox.com/sh/aqessuwn289iiww/AAD0s5S5qJ_bFMNrjW05WlJ8a?dl=0.

• Local Training: Depending on the experience level of the volunteer attorneys, the local event organizers may choose to host a free training session for attorney volunteers using the written materials mentioned above. If you need assistance in planning local attorney training, please contact Lauren Benbow at lbenbow@sosnc.com.

Counseling Clients at the Workshop: At the beginning of each session, the attorney needs to review the Limited Scope of Representation document on Appendix C with the client.

Collecting and Submitting Data to Ensure NCBA Malpractice Coverage Is Provided: Please review Appendices D and E for information and requirements regarding malpractice coverage.
Community Partner Responsibilities

Recruiting Volunteers: Make sure you have plenty of volunteers to serve in the following roles:

- **Notaries** – Because North Carolina law requires that advance directives be notarized, you need to have at least 1 notary at the workshop. If any of the volunteer attorneys also are notaries, then they assist with notarizing documents in addition to counseling clients.

- **Witnesses** – North Carolina law also requires that advance directives be witnessed by 2 qualified witnesses.
  - The witnesses **cannot** be the attorney advising the client or the notary who notarizes the advance directive documents.
  - Health care providers **may** witness but they **cannot** be employees of a health care facility or medical clinic where the individual is a patient or resident.
  - Witnesses cannot be related to the individual signing the advance directive.
  - Witnesses cannot be anyone who would inherit property from the client upon the client’s death.

- **Greeters**
  - Volunteers should be available to greet and direct participants upon arrival.
  - The same people may survey participants as they leave.

- **Floaters**
  - General volunteers will help identify and assist with needs during the workshop.
  - They help direct participants to the event location, serve refreshments and ensure witnesses and notaries are present when needed.

- **Health care providers**
  - Having at least one health care provider available will be helpful in discussing questions related to medical treatment (*i.e.* artificial nutrition and hydration, CPR, mechanical ventilation, kidney dialysis, etc.) and medical orders (DNR and MOST).

Marketing/Awareness:

- Prepare to actively market your event and reach out to local groups. Do not assume people will come to you!
- If your event is in April, register your event for National Healthcare Decisions Day (NHDD) at [www.nhdd.org](http://www.nhdd.org).
- Consider multiple strategies for marketing and spreading the word (see the “Marketing and Event Promotion” section for additional information).
  - Posters/flyers
  - Social media & website
**Venue Layout:** Consider your needs and how you will lay out the room:
- Is there a place for individuals to wait?
- Are there enough chairs and tables?
- Does your room arrangement provide as much privacy as possible for participants to discuss their personal end-of-life treatment options and decisions?
- Do you need any additional equipment?

**Signage:**
- Make sure you have directional signs both inside and outside to make sure people know where to go (and to alert passersby to the event).
Marketing and Event Promotion

NCBA Approval:

- If you are going to use the basic form (such as the template shown in Appendix H) and change only the time, place, and contact information, you do not have to get the approval of the NC Bar Association. This form has already been approved.
- If you are going to use a different form to market the event, you must send it to Andi Bradford at abradford@ncbar.org for approval.

Recommended text:

- Title: A Gift to Your Family: Advance Care Planning Workshop
- Description:
  - A free, hands-on workshop to learn about & prepare your advance directives
  - You will be able to:
    - Learn about Health Care Powers of Attorney
    - Learn about living wills
    - Complete your advance directives*
    - Talk about your wishes for end-of-life treatment
  - *Please note: you will need to bring photo identification in order to have your advance directives notarized. If you have any questions before the event, email [contact name] at [contact email address or phone #].

Required information:

- NCBA and NCPCC logos: These logos should be the largest logos and located front and center.
- Date and Times: Make sure it is clear that individuals can either drop in or have appointment times and do not have to stay for the duration of the event.
- Location and address

Adding your logo(s):

- We know it may be important to you to include logos of community partners and sponsors. This is a great way to add community recognition and gain local trust. Even so, please make sure the NCBA and NCPCC logos remain on any marketing materials as the largest and most visible logos.
- You must email a draft to Andi Bradford at abradford@ncbar.org for approval.

Tips & Tricks:

- Send the information for your workshop to:
  - Russell Rawlings at rrawlings@ncbar.org and request that he put your information into the eBar.
  - Melanie Phelps (with the NC Partnership for Compassionate Care) at mphelps@ncpcc.org and request that she put your information on the NCPCC website.
• Lauren Benbow (with the NC Department of the Secretary of State) at lbenbow@sosnc.com or (919) 807-2166 to see if anyone at the Secretary of State’s Office is available to attend your workshop and provide information about the NC Advance Directives Registry.
• Distribute promotional materials at upcoming community events or health fairs
• Partner with local retail businesses and restaurants by asking them to hang or place promotional flyers where they are readily visible.
• Distribute flyers about your event in local physician offices and in strategic locations such as the elevators in public buildings and pharmacy bulletin boards.
• Contact local media (newspapers, TV, radio) and encourage them to write a piece about your event and the community’s involvement. See Appendices I and J for sample press releases.
• Start posting on social media 1-2 months in advance to pique and hold interest.
Social Media

Twitter:
Pictures work best! Please tweet the date & location of your workshop ahead of time and tag the NCBA using the handle @NCBAorg.

Facebook:
Spread the word using Facebook and reach more people by tagging the NCBA with the handle @NCBAorg.

Sample Posts:
An advance directive documents who can speak for you if you cannot speak for your own health care decisions. Everyone needs an advocate. #AdvanceCarePlanning

Don’t wait for the “right time” to talk about advance directives w/ your family. Start today! #AdvanceCarePlanning

Do you know what your advance directive options are? Attend our workshop on [DATE] with @NCBAorg to learn more and get your wishes documented.

Do you have an easily updatable & accessible #AdvanceDirective? Learn more at our workshop on [DATE] with @NCBAorg to learn about your options. #AdvanceCarePlanning

Check out the “Imagine” video on Vimeo https://vimeo.com/36052824 #AdvanceDirective #LivingWill #AdvanceCarePlanning

We prepare for our future in so many ways - our #healthcare wishes should be included! #AdvanceCarePlanning
Materials

Provided by NCBA:
[Note: These materials must be requested in advance. The NCBA will arrange a time for you to pick them up or the materials may be shipped to you at your expense. Please email Andi Bradford at abradford@ncbar.org to request these materials.]

- Begin the Conversation NC Toolkits (optional – while supplies last)
- Begin the Conversation NC Wallet Cards (optional – while supplies last)

Provided by The North Carolina Department of the Secretary of State:
[Note: These materials must be requested in advance OR may be printed/copied on your own. To request paper copies, email Lauren Benbow at lbenbow@sosnc.com. To print on your own, go to: http://www.secretary.state.nc.us/ahcdr/pdf/registrybrochure.pdf.]

- Advance Health Care Directive Registry brochures

Items you are responsible for providing:
- Name tags (for everyone in attendance)
- Directional signage
- Flyers and posters (template available or create your own – must be approved by the NCBA if you change the name of the event, branding, etc.)

Items you are responsible for downloading (for free) and printing:
https://www.dropbox.com/sh/wuv15eo8c93ifgl/AAAvOPg8SscBLrZUqfDmxqhva?dl=0

For Participants:
- “A Gift to Your Family”: Your Guide to Advance Care Planning
- Participant Feedback Form
- An Advance Directive for North Carolina: A Practical Form for All Adults (ENGLISH) [Forms also are available in Spanish, Russian and Korean if needed]
- “Help Needed” Signs (or Table Tents)
  - We recommend that you print each of these in a different color so it is easy to recognize a need from across the room.
- Limited Scope of Representation – must be reviewed with clients prior to providing legal advice
Frequently Asked Questions

1. Are there funds available from the NC Bar Association to host a workshop?
   No. The NC Bar Association is unable to provide funds for workshops. Your local sponsors will likely donate funds to help with your workshop. If you are unable to secure funding, you can always hold your workshop at a free location!

2. Can law students participate?
   Yes. Any student who is participating in the Cancer Pro Bono Project has been thoroughly trained and could lead a discussion with a supervising attorney present. Other students interested in participating will need to be trained on advance care planning and have a supervising attorney present. Students who have not done any training should be allowed only to observe until they have been trained.

3. Are clients financially screened?
   No. Services are provided to any client who seeks assistance with completing advance directives.

4. Do clients sign a limited scope of representation form?
   No. Attorneys should review a copy of the limited scope of representation form with the client before beginning the counseling session. See Appendix C.

5. What training is available for my event?
   There are several options for attorney training prior to the event. See the page entitled “Attorney Training Options” for more information.

6. How can I market my event online?
   There are many ways to market your event online and via social media. Please see the page entitled “Social Media” for information and sample posts.

7. Who should I contact if I have additional questions or concerns?
   Andi Bradford – abradford@ncbar.org
APPENDICES
Appendix A: Sample Letter to Local Bar Association

The North Carolina Bar Association is introducing its new pro bono project entitled "A Gift to Your Family". This project is a collaboration of the Health Law and Elder Law sections of the NCBA and the NC Partnership for Compassionate Care (a program of the NC Medical Society Foundation). We would like to invite all members of the [NAME OF COUNTY] County Bar Association to join in.

The goal of this project is to hold advance care planning workshops to assist members of the public with completion of Health Care Power of Attorney documents and living wills. As you may know, those two documents provide the ability for people to make their own health care decisions, before they reach a time in their lives when they are no longer able to do it for themselves. The NCBA held pilot workshops in January in Durham and in Asheville, Gastonia, Manteo, Wilmington and Winston-Salem in April. These workshops have been tremendously successful. Ultimately, the NCBA hopes to have workshops in all 100 counties across the state twice a year – in April to help promote National Healthcare Decisions Day and in November to promote National Hospice and Palliative Care Month.

But for now, the NCBA and the NC Partnership for Compassionate Care have recently connected with local community partners who want to co-host advance care planning workshops in [NAME OF COUNTY] County. However, we are in need of attorney volunteers for [DATE]. This is a great opportunity for you to help improve end-of-life care in our community.

We have all the materials you'll need, including an online CLE to train volunteer attorneys on how to have these conversations with the members of the public. The training can be accessed here: http://goo.gl/pRVqFR.

If you are interested in being involved in this wonderful project, please e-mail [CONTACT NAME] at [CONTACT EMAIL ADDRESS]. For planning purposes, we'd greatly appreciate it if you could contact us by [DATE].

Thank you!

[NAME]
Appendix B: Sample Reminder Letter for Volunteer Attorneys

Thank you again for volunteering to help with the NC Bar Association’s “A Gift to Your Family” Advance Care Planning Workshop. The date and time for the workshop has been set for [DATE] from [BEGINNING TIME] to [ENDING TIME] at [LOCATION AND ADDRESS].

Please return the following information to us so we can plan appropriately:

Availability:
- Full event [TIMES]
- Morning block only [TIMES]
- Afternoon block only [TIMES]

Experience:
- Advance care planning expert
- Some advance care planning experience
- No advance care planning experience

Notary:
- Please let us know if you are a notary!

For those with little to no prior experience, there is an on-demand CLE Webinar on the NC Bar Association’s website called “A Gift to your Family – Advance Care Planning.” The CLE is for 1.5 hours credit and costs $50. This training can be accessed here: http://goo.gl/pRVqFR. Although it will be helpful to complete the NCBA Webinar, it is not mandatory. We will send you sufficient training materials to help you prepare for the workshop and arrange for additional training as needed.

We would also appreciate it if you would let us know by return email if you are not able to participate in the workshop on [DATE].

Thank you again for volunteering your time to be a part of this important project and helping to improve end-of-life care in our community.

We look forward to hearing from you.

[NAME]
[EMAIL ADDRESS]
[PHONE #]
Appendix C: Limited Scope of Representation

A Gift to Your Family:
Limited Scope of Representation

Please read carefully.

The Health Law Section and Elder Law Section of the North Carolina Bar Association have partnered with local attorneys across the state to provide limited free legal help with advance care planning.

We will help you with two legal documents:
1. Health Care Power of Attorney
2. Living Will

These documents are typically uncomplicated. Our time today is sufficient for us to help you in these matters. As such, our attorney-client relationship will be limited.

Limited scope representation means:
• Our help is limited to completing the documents listed above.
• We cannot help you with any other legal issues.
  o If you have other legal issues, we will be happy to give you information on how to contact a lawyer for help.
• We will give you instructions on any additional things you need to do to make sure that your wishes are honored. Those steps will be your responsibility.
• We are not your lawyers after you leave today.

Thank you for giving us the chance to help you!

North Carolina Bar Association
Seeking Liberty & Justice
Appendix D: NCBA Malpractice Coverage Information

Guidelines for NCBA-Provided Malpractice Insurance Coverage

The North Carolina Bar Association Foundation offers malpractice insurance coverage to NCBA members who participate in pro bono and public service projects sponsored by the North Carolina Bar Association or the North Carolina Bar Association Foundation. Non-NCBA members are not covered under the NCBA's malpractice insurance policy, even if the non-members are participating in an NCBA-sponsored pro bono or public service project.

For malpractice coverage to apply, pro bono projects must first be reviewed and endorsed by the NCBA Pro Bono Activities Committee. To submit a project proposal, organizers should fill out the Pro Bono Project Proposal Form, which is accessible online through the Pro Bono Activities Committee webpage at: https://www.ncbar.org/members/committees/pro-bono-activities.

For every pro bono event, each attorney and paralegal participant must fill out the Pro Bono Activities Form, which requires information about the event date and location, attorney/paralegal contact information, client contact information, and a short description of the type of service provided to each client. Completed Pro Bono Activities Forms should be returned to Kim Bart Mullikin, NCBA Director of Public Service and Pro Bono Activities, at kbartmullikin@ncbar.org.

For questions about NCBA malpractice insurance coverage, please contact Kim Bart Mullikin at kbartmullikin@ncbar.org.
Appendix E: NCBA Pro Bono Activities Form

**NCBA Pro Bono Activities Form**

This form must be filled out by every participating attorney for every NCBA-sponsored pro bono activity that involves the provision of legal advice or counseling, or otherwise provides professional services to organizations or clients as part of an NCBA Section, Division or Committee-sponsored pro bono project or event. Duplicate this form as needed.

Please return this form to Kim Bart Mullikin, NCBA Director of Public Service & Pro Bono Activities (kbartmullikin@ncbar.org).

**Event Name:**

**Sponsoring NCBA Section, Division or Committee:**

**Event Date:**

**Location/Host Site:**

**Attorney Name:**

**Law Firm:**

**Email Address:**

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<th>Client Name</th>
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<th>Type of Assistance Provided to Client</th>
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Appendix F: Sample Letter to Local Organizations

Good afternoon,

[Option one] VOLUNTEERS NEEDED! Would any leaders at your [TYPE OF ORGANIZATION – i.e., religious, community group, etc.] organization volunteer an hour or two of their time on [DATE] to counsel participants in the community project “A Gift to Your Family: Advance Care Planning” hosted by the North Carolina Bar Association and the NC Partnership for Compassionate Care? Please see the information below.

[Option two] PARTICIPANTS WANTED! Would members of your [TYPE OF ORGANIZATION/COMMUNITY – i.e., religious, community group, etc.] community be interested in participating in this program and completing advance care directives free of charge? Please help us by posting the attached flyer on a bulletin board or your website, including social media outlets such as your Facebook page. We request that volunteers and participants register for the event online at: www.agifttoyourfamily.org.

[Include remainder for both] Please do not hesitate to contact me if you have any questions. Thank you in advance for your assistance!

“A Gift to Your Family” Advance Care Planning
A free, hands-on workshop to learn about and prepare your advance care planning documents

- Learn about health care powers of attorney
- Learn about living wills
- Complete your advance directives*
- Talk about your wishes for end-of-life treatment

[DATE]
[TIME]
[LOCATION]
[ADDRESS]

*Please note: you will need to bring photo identification in order to have your advance directives notarized. If you have questions before the event, email [EVENT CONTACT NAME] at [EMAIL ADDRESS].

Thank you!
[CONTACT NAME]

[ATTACH FLYER]
Appendix G: Participant Feedback Form

Name of Group/Event: ________________________________
Date of Event: _____________

1. Did you have an advance directive prior to attending this event?
   - Yes
   - No

2. What was your main reason for attending this event?
   - I am coping with an end-of-life situation in my personal life
   - I want to be prepared for the future
   - I am concerned about the availability of quality end-of-life care in the community
   - I thought it sounded interesting
   - I was invited by a friend, family member, or colleague
   - Other: ____________________________________________________

3. What was your overall impression of the information provided?
   (Check the statement that best applies)
   - I learned many new things that will be useful to me
   - I learned a few new things that will be useful to me
   - I learned new things, but nothing of use to me
   - I did not learn anything new, but it was a good review
   - I did not learn anything new and was disappointed
   - Other: ____________________________________________________
4. After attending this event, which of the following are you likely to do within the next month or two? (Check all that apply)
- More thinking and/or reading about this topic
- Talk to family members and/or close friends about this topic
- Talk with my doctor about this topic
- Talk with someone in my faith community about this topic
- Complete an advance directive form or written statement of my wishes
- Update my advance directive form or written statement of my wishes
- Help someone I know to complete an advance directive form or written statement of end-of-life wishes
- Get involved in efforts to improve end-of-life care in the community
- Other: ____________________________

5. Are there things you expected or hoped to hear about that did not come up in the discussion?
- No
- Yes (explain):
  ______________________________________________________
  ______________________________________________________

6. Additional comments:

7. Please provide some demographic information:
- Male  Female
- 35 or younger  36-50  50-65  66 or older

  Race/ Ethnicity: ____________________________
Appendix H: Sample Flyer/Poster

A Gift to Your Family
ADVANCE CARE PLANNING

A free, hands-on clinic to learn about & prepare your advance care planning documents

You will be able to:

• Learn about health care powers of attorney
• Learn about living wills
• Complete your advance directives*
• Talk about your wishes for end-of-life treatment

WHEN:

WHERE:

*Please note: You will need to bring a photo ID in order to have your advance directives notarized.

A community project of the NCBA Health Law and Elder Law sections and the NC Partnership for Compassionate Care

Find more information at www.agifttoyourfamily.org
Appendix I: Example Press Release (April)

For Immediate Release:
[DATE]

Pro Bono Advance Care Planning Workshop Set For [DATE] to Celebrate Health Care Decisions Day

[CITY, STATE] - [ORGANIZATION/GROUP NAME], along with other national, state, and community organizations, are leading a massive effort to highlight the importance of advance care decision-making – an effort that has culminated in the formal designation of April 16th as National Healthcare Decisions Day (NHDD) and Health Care Decisions Day in North Carolina.

The North Carolina Bar Association, NC Partnership for Compassionate Care, local attorneys, and [list your organization] are providing information and tools for the public to talk about their wishes with family, friends and health care providers, and to execute written advance directives (Health Care Power of Attorney and living will) in accordance with North Carolina state laws. These resources are available online at [www.agifttoyourfamily.org](http://www.agifttoyourfamily.org).

Specifically, on [DATE], from [START TIME] to [END TIME], [ORGANIZATION/GROUP NAME] is welcoming the public throughout the day at [LOCATION & ADDRESS] with free information about advance care planning and assistance with completing Health Care Power of Attorney and living will forms.

“As a result of National Healthcare Decisions Day, many more people in our community can make their wishes known through thoughtful conversations about their health care decisions and complete reliable advance directives to make their wishes known,” said [List spokesperson name, title and organization]. “Fewer families and health care providers will have to struggle with making difficult health care decisions in the absence of guidance from the patient. Health care providers and facilities will be better equipped to address advance care planning issues before a crisis and be better able to honor patient wishes when the time comes to do so.”


Contact: [NAME, ORGANIZATION, PHONE #, EMAIL]
Appendix J: Example Press Release (November)

For Immediate Release:
[DATE]

Pro Bono Advance Care Planning Workshop Set For [DATE]

[CITY, STATE] - [ORGANIZATION/GROUP NAME], along with the NC Bar Association, NC Partnership for Compassionate Care, and local attorneys, are leading a massive effort to highlight the importance of advance care planning. Advance care planning is a process that allows individuals to state their preferences about medical treatment and to name someone they trust to make health care decisions for them if they ever become unable to speak for themselves. It includes having conversations with family, friends and health care providers. It also includes completing advance directive documents such as the Health Care Power of Attorney and living will.

During November, which is designated National Hospice and Palliative Care month, it is important to consider and document important end-of-life decisions and to dispel common myths about hospice and palliative care. As a participating organization, [list your organization] is providing information and tools for the public to talk about their wishes with family, friends and health care providers, as well as to execute written advance directives. More information is available online at www.agifttoyourfamily.org.

Specifically, on [DATE], from [START TIME] to [END TIME], [ORGANIZATION/GROUP NAME] is welcoming the public throughout the day at [LOCATION & ADDRESS] with free information about advance care planning and assistance with completing Health Care Power of Attorney and living will forms.

[INCLUDE A QUOTE OR MORE INFORMATION HERE]

For more information about advance care planning and these pro bono workshops statewide, visit www.agifttoyourfamily.org.

Contact: [NAME, ORGANIZATION, PHONE #, EMAIL]