**Outcomes Report of Activities Supported by**

**Campus Alberta HOPH Meeting Grant**

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| **Date of Report** | **November 3, 2017** |
| **Dates of Meetings** | February 20, 2015 (Edmonton)  February 23, 2015 (Calgary)  September 24, 2015 (Red Deer)  February 22, 2017 (Red Deer)  September 8, 2017 (Banff) |
| **Titles of Meetings** | “ACP CRIO/CBA Collaboration – Lawyers’ Roles and Needs Regarding  Advance Care Planning and Related Legal Issues” (Feb. 20 and 23, 2015)  “Medical-Legal Collaboration Workshop” and “Advance Care Planning – How Lawyers Can Help Their Clients: A Continuing Education Event” (Sept. 24, 2015)  “Medical legal Advance Care Planning Collaboration Meeting” (Feb. 22, 2017)  “Health & Legal Sector Collaboration to Support Advance Care Planning – Workshop at the 2017 International Conference on Advance Care Planning and End of Life Care (ACPEL)” (Sept. 8, 2017) |
| **Team Lead(s)** | Nola Ries, Maureen Douglas |
| **Amount of Award** | $5000 |

1. **Please append the program/agenda for your HOPH-sponsored meetings.**

See attached meeting agendas.

1. **Meeting attendance** (total number of attendees, affiliations represented, *etc*):

February 20, 2015: 15 attendees representing: the ACP CRIO research team; lawyers in private practice (largely or exclusively wills and estates, health or elder law matters); Legal Education Society of Alberta; Canadian Bar Association; ethicists representing Alberta Health Services and Covenant Health; Covenant Health legal counsel; the Office of the Public Guardian and Trustee; and physicians with expertise in end-of-life care.

February 23, 2015: 18 attendees representing: the ACP CRIO research team; healthcare providers; lawyers in private practice (largely or exclusively wills and estates, health or elder law matters); Calgary Legal Guidance; Canadian Bar Association; the Office of the Public Guardian and Trustee; Alberta Health Services legal counsel; Alberta Health Services’ Advance Care Planning and Goals of Care Designation (ACP GCD) program; two public advisors to the ACP CRIO research program; a private trustee; and an ethicist.

September 24, 2015: ***1. Workshop*:** 16 attendees representing: the ACP CRIO research team; lawyers in private practice (largely or exclusively wills and estates, health or elder law matters); the Canadian Bar Association, the Office of the Public Guardian and Trustee; Alberta Health Services legal counsel; a Covenant Health ethicist; Alberta Health; and one public advisor to the ACP CRIO research program.

***2. Continuing Education event*:** Approximately 26 attendees representing groups listed above, plus wealth management firms and Children’s Legal and Educational Resource.

February 22, 2017: 19 attendees representing: the ACP CRIO research team; physicians; lawyers in private practice (largely or exclusively wills and estates, health or elder law matters); Calgary Legal Guidance; the Office of the Public Guardian and Trustee; the Canadian Bar Association; Alberta Health Services, Covenant Health and Age Care legal counsel; Alberta Health Services’ ACP GCD program; and one public advisor to the ACP CRIO research program.

September 8, 2017: ~45 attendees (from Alberta and internationally) representing: the ACP CRIO research team; researchers; physicians and other healthcare providers; lawyers in private practice (largely or exclusively wills and estates, health or elder law matters); the Canadian Bar Association; the Office of the Public Guardian and Trustee; Alberta Health Services’ ACP GCD program; and one public advisor to the ACP CRIO research program.

1. **Outline the meeting expenses covered by the awarded funding:**

The awarded funding covered catering, travel, and parking expenses for the Feb. 20 and 23 2015 meetings, the Sept. 24 2015 meeting and the Feb. 22 2017 meeting, as well as partial registration costs for the ACPEL 2017 conference for Elizabeth Tobin-Tyler, one of our invited speakers to the medical-legal workshop held at ACPEL on Sept 8, 2017.

1. **List, link, provide, or explain existing or planned products from the meetings** (reports, publications, *etc*):

Publications:

Ries N, Douglas M, Simon JE, Fassbender K. How do lawyers assist their clients with advance care planning? Findings from a cross-sectional survey of lawyers in Alberta, Canada. Alberta Law Review (in press).

Ries N, Douglas M, Simon JE, Fassbender K. Doctors, lawyers and advance care planning: time for innovation to work together to meet client needs. Healthcare Policy 2016; 12(2): 13-18.

Ries NM. Lawyers and advance care and end of life planning: enhancing collaboration between legal and health professions. Journal of Law and Medicine 2016; 23(4): 887-906.

Presentations:

Maureen Douglas. “Integrating advance care planning into legal practice: development of an ACP legal toolkit.” Oral presentation at the 2015 Campus Alberta Health Outcomes and Public Health Annual Provincial Forum, Edmonton, Alberta, May 13, 2015.

Maureen L. Douglas, Konrad Fassbender, Jessica E. Simon, Patricia D. Biondo, Eric Wasylenko & Nola M. Ries.*“*Integrating Advance Care Planning into Legal Practice: Development of an ACP Legal Toolkit.” Oral presentation at the 5th International Conference on Advance Care Planning and End of Life Care (ACPEL), Munich, Germany, September 9-12, 2015.

Maureen Douglas, Konrad Fassbender, Jessica Simon, Patricia Biondo, Eric Wasylenko, & Nola M. Ries. “Medical-Legal Collaboration: Lawyers Role in Advance Care Planning.” Poster presentation at the 26th Annual Covenant Health Palliative Education & Research Days, Edmonton, Alberta, October 26-27, 2015.

Jessica Simon. “Medical Legal Collaboration on Advance Care Planning.” Oral presentation to the Canadian Bar Association (Alberta Branch) Elder Law South, April 14, 2016.

Maureen Douglas. “Medical Legal Collaboration on Advance Care Planning.” Oral presentation to the Canadian Bar Association (Alberta Branch) Elder Law North, June 6, 2016.

Maureen L. Douglas, Konrad Fassbender, Jessica E. Simon, Patricia D. Biondo, Eric Wasylenko & Nola M. Ries. “Medical-Legal Collaboration: Lawyer’s Role in Advance Care Planning.” Poster presentation at the 27th Annual Covenant Health Palliative Care Education & Research Days, Edmonton, Alberta, October 24-25, 2016.

Nola Ries, Maureen Douglas, Jessica Simon, Patricia Biondo, Konrad Fassbender. “How do Lawyers Assist their Clients with Advance Care Planning? Findings from a Cross-Sectional Survey of Lawyers in Alberta, Canada.” Poster presentation at the European Association for Palliative Care 2017 Conference, Madrid, Spain, May 18-20, 2017.

Workshops:

Nola Ries, Shelley Waite, Jessica Simon. “Advance Care Planning – How Lawyers Can Help Their Clients: A Continuing Education Event”. Continuing Professional Development learning activity for Alberta lawyers, Red Deer, Alberta, September 24, 2015.

Nola Ries, Elizabeth Tobin-Tyler. “Health & Legal Sector Collaboration to Support Advance Care Planning.” Workshop presented at the 2017 International Conference on Advance Care Planning and End of Life Care (ACPEL), Banff, Alberta, September 6-9, 2017.

Survey:

Survey of Alberta Lawyers About Advance Care Planning.

1. **List (with projected timelines and names of participants) what activities or next steps are ensuing from the meeting** (follow-up meetings, *etc*):

These meetings permitted us to engage representative stakeholders on Advance Care Planning from the medical and legal communities including the Canadian Bar Association, the Legal Education Society of Alberta, the Office of Public Guardian and Trustee, Alberta Health, Alberta Health Services, Covenant Health, Legal Assistance, ethicists, social workers, educators and patient advisors. We have now established a collaborative and engaged group motivated to carry out **next steps** identified by the group including: review and harmonization of resources for clients, agents and lawyers and joint education for lawyers and health care providers on health care policies and practices and best legal practices. We have recently (September, October 2017) held preliminary discussions with key stakeholders (the Office of the Public Guardian and Trustee, the Legal Education Society of Alberta) to map out potential funding sources and organization models to carry out these activities. We are currently drafting a business case to be presented to the wider group of stakeholders.

1. **Please provide any additional commentary on the benefits or unexpected consequences arising from the meeting:**

ACP CRIO adopted the Knowledge-to-Action cycle framework of knowledge creation and implementation. This cycle is characterized by the participation of knowledge users in identification of barriers and adaptation of the knowledge to the local context. Campus Alberta meeting funds permitted us to engage relevant groups at the outset of our project so that activities were developed and supported by end-users. For example, at our initial meetings (February 2015), stakeholders identified and gave examples of a number of barriers. They suggested a survey of Alberta lawyers to determine how widespread these barriers are and participated in content development (September 2015), pilot testing and promotion of the survey.

These stakeholders have become champions of the activities, giving of their time, expertise and connections to optimize the success of these activities. One of the unexpected consequences is the development of an ongoing, candid and collegial inter-professional network of legal and health care professionals. This has contributed to breaking down “silos” and contributing to a better understanding of professional and practice contexts.