

**Missouri Independence Plus Initiative
Participant Guide**

Person-Centered Planning Workbook



**Developed by the Institute for Human Development, (UCEDD)
University of Missouri - Kansas City
in partnership with the Missouri Department of Mental Health-Division of MR/DD,
the Missouri Planning Council for Developmental Disabilities, and
the Missouri Partnership for Self-Directed Support Statewide Task Force**

**Funding provided by the Center for Medicare and Medicaid Services (CMS)
Independence Plus Initiative**

PERSON CENTERED PLANNING

Overview:

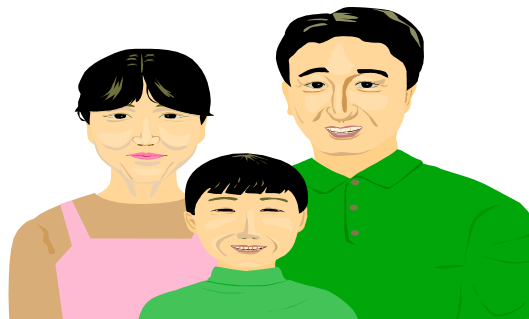
We all dream about making our lives better. Sometimes these dreams are our secret hopes or they might be specific ideas about what we want to achieve in life and how we want our lives eventually to be (DiLeo, 1996). This workbook presents introductory information on person centered planning. We will also discuss how the person's plan fits into the Independence Plus pilot project. Information about selecting and working with a facilitator is covered as well as developing a back up plan, and identifying supports. This booklet describes your options regarding various people who can facilitate your plan for you. There is also information designed to assist you in preparing for getting started in planning. Finally, this booklet gives you an overview of the entire planning process and each phase of planning fits with the overall plan. Person centered planning is an exciting journey – enjoy the trip!

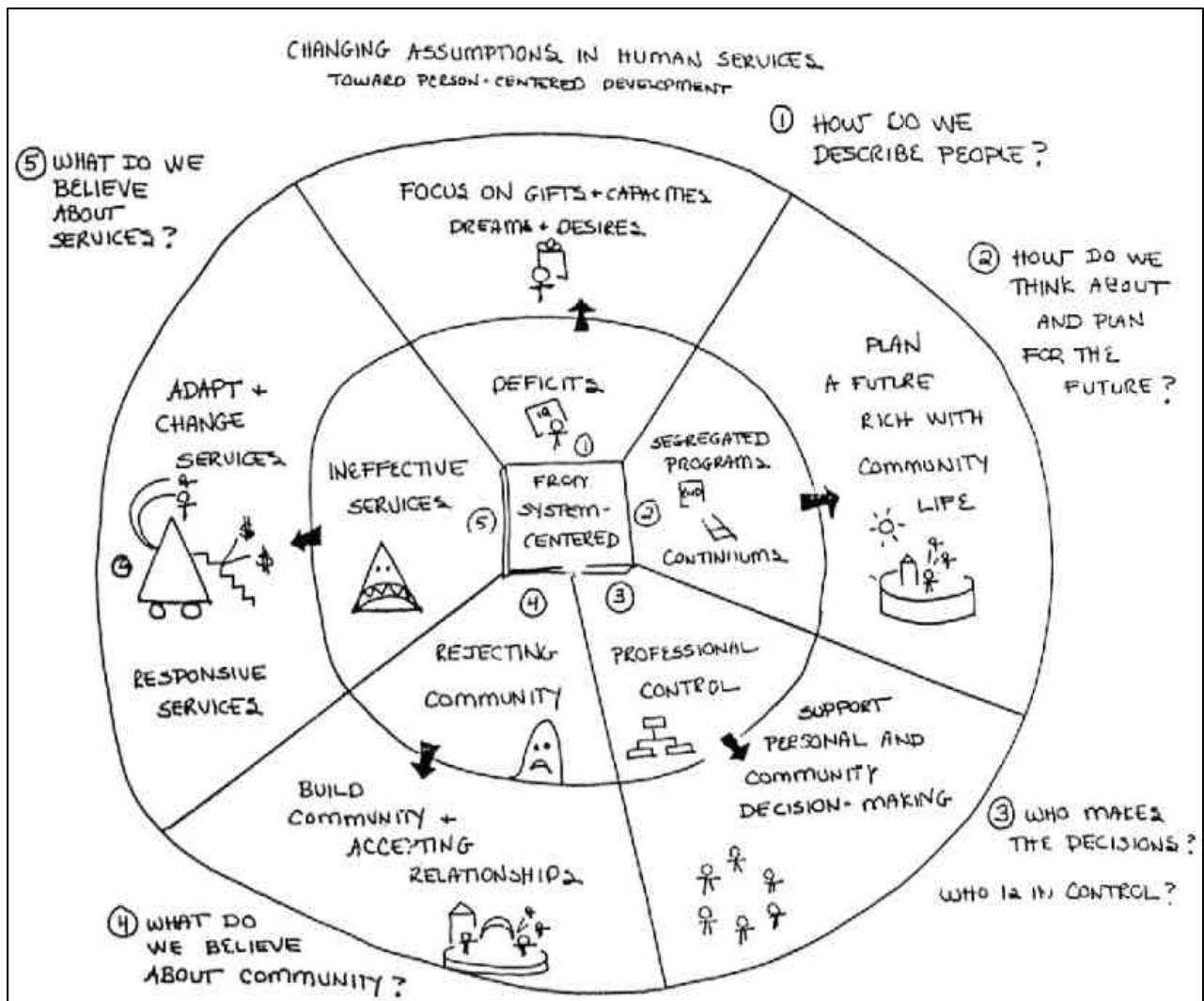
In This Session You Will Learn:

1. The values and philosophy of person centered planning
2. How person centered planning drives the Independence Plus pilot project
3. Ideas about selecting a facilitator
4. What preparation needs to be done in advance of the first planning meeting
5. The importance of a back-up plan

“personal futures planning is a tool to help clarify a path out of the stereotypes and programs that define and limit people. We enter each unique journey with people by weaving together the threads of a person's personal history and character, the contributions of the people who care for them, the opportunities and challenges in their local communities and the resources in human service programs. Personal futures planning is a process that helps design a roadmap for bringing these contributions into relationships and community life.”

----Beth Mount, 2000





From Beth Mount, 1992

About person centered planning

Person centered planning is a powerful way to create changes in your life. It is a process where you work together with people who care about you. These allies provide you ideas, support and assistance as you seek to make changes and to pursue your dreams. It is an approach to planning which helps others learn more about you so they can assist you in discovering and pursuing a life and a lifestyle which fits with who you are and provides you ways to contribute to your community. In the process of planning, people meet together with you, but the plan is much more than a meeting. The meetings are opportunities to share information and formulate a plan of action which will move you closer to your life goals. Between meetings, you and your supporters put ideas into action. Beth Mount describes person centered planning as “an ongoing process of innovation that can help liberate people from oppressive environments and processes that are harmful.” (Beth Mount, 1992)

Person centered planning is based a different set of assumptions than traditional system driven plans for people who need support or assistance (see diagram on p 4).

- In the planning process, you are the focus person. You and those who you have been invited to plan with you, look at your capacities. You explore together your interests, gifts and talents; you share your hopes and dreams, your fears and concerns.
- You and your circle of supporters begin planning for a life that makes sense to you NOW. A key part of the plan is identifying supports the person needs to move toward a life that makes sense. Rather than “being ready” for the life you want, the planning identifies what you need to be successful at what you want your life to look like.
- The planners are those who know the person best and are willing to invest time and energy in exploring possibilities and engaging in the work necessary to move from ideas to reality. You and those you have invited to plan are in charge. You make the decisions.
- You and your planners seek to discover ways to develop relationships and community connections. Person centered planning says that everyone has a contribution to make and that communities are better when they are diverse.
- You and your planners seek to discover ways in which services can be responsive and creatively provide individually tailored supports.

Your person centered plan and participation in the Independence Plus Pilot project

Your person centered plan is the foundation for self directing the supports and services you receive. In your plan you will identify:

- the things which you wish to change
- your goals for the future

- the support and assistance you need to reach those goals and to make these changes
- identify the actions which you and others will take to accomplish goals

Some of the assistance you receive will be provided by friends, family, co-workers, neighbors and so forth. This kind of assistance is sometimes called natural support or informal support. Other support may be provided from one or more agencies. This is called formal paid support. Part of self direction involves managing these supports, both paid and unpaid. In the pilot project you can have particular kinds of assistance in managing these supports, including a support broker and a fiscal intermediary. But ultimately you are “running the show.”

Whatever paid support or services which you receive must be consistent with Medicaid funding guidelines. Ultimately you must present a support plan which will generate the funds which provide for paid supports and services. Your plan is one of the tools which you use to do this. It is often helpful, for example to look at a typical day or a typical week to identify your activities and the support you will need to engage in these activities. Other tools which may be helpful in identifying and justifying your support requirements may include:

- The Support Intensity Scale. This is a tool in which you and others, who know you, provide information about the type and amount of assistance you need for various activities and events in your life.
- Person Centered Planning Summary and Quarterly Support Plan. The person centered planning summary is a way to bring together the goals you identify as you plan. The Quarterly Support Plan represents a way to list activities related to these goals along with the support you need to accomplish them. In this summary you can then identify those paid supports which you are seeking from a particular agency.
- My Typical Schedule worksheets. This is simply a way to identify the support you need across a week hour by hour.

You and your facilitator and your service coordinator may need to summarize these supports needs so that a support plan can be generated. This defines the paid support which is necessary for you to live your own life as you have discussed it in your plan. A budget will be generated from your support plan, which reflects the money available to pay for the supports. Once you have developed a budget, you will begin to secure the supports which have been identified. If you choose to work with a support broker, he or she will assist you with this. More detail about moving from your plan to budget development and securing supports is provided in The Participant’s Individual Budget Workbook.

Another key task which needs to be part of your plan is identifying back up. This is simply a way to plan for the “unexpected” to assure that your health or safety is not placed in jeopardy. You and your planning team need to identify people you can call if, for example, one of your support staff becomes ill and is unable to come to work. Or what will you do if your ride to or from work does not show up. Your back up plan may include both paid and non-paid support. But it should spell out very specifically what you can do if problems arise.

Selecting a facilitator

As in every aspect of self direction, you, as the consumer, control the person centered planning process. There are many decisions to be made along the way. That is one of the reasons identifying people you wish to be your planners is so important. Another source of assistance in moving your plan ahead is asking someone to facilitate the plan for you.

As a pilot participant in the Independence Plus initiative you have three options in regard to facilitating your plan. You or your designated personal advocate may:

- Facilitate your own plan;
- Hire an independent facilitator, not connected with an agency; or
- Have a MRDD service coordinator facilitate the plan.

The following information is provided to assist you in selecting a facilitator if you choose to do so.

Qualities of Facilitators

A good facilitator makes the planning and work go smoother. A practiced facilitator understands and reflects the values and assumptions of person centered work. They are able to “use” these values as they facilitate the planning process. They also are skilled in using the tools and strategies which are part of the person centered planning process. Look for a facilitator who can:

- facilitate the group learning process,
- keep the planners focused on you and your vision
- assist you and your planners in translating ideas into action
- demonstrate good communication and interpersonal skills
- encourage all to participate,
- keep the work moving
- assist planners by summarizing and clarifying what has been said
- use group graphics to capture discussion, direction and action steps

A good facilitator understands the planning process. They make the work occur in an efficient and effective manner by assuring that tasks are accomplished, that gatherings occur and begin and end on time; that summaries are developed and disseminated to all group members. A skilled facilitator seems to do this work in a way that seems effortless. Finally, a skilled facilitator possesses a strong sense of community inclusion and, because they see the value in each individual, believes that everyone has contributions to make and that communities are stronger when each member has that opportunity.

Working with your planning facilitator

If you choose a facilitator, remember that they work for you. This means that you must be able to work with the facilitator you choose. A good facilitator will meet with

you before gatherings of your planning circle to determine with you what you want to accomplish. They may make suggestions about people to invite or ways to gather information; but, the ultimate decision is always yours. In addition to looking at the qualities of facilitators identified above, it is helpful to select someone who seems easy to get along with and is readily available when you have questions.

Take a moment to consider the questions below. This may be helpful in deciding if you wish to facilitate your own plan or want someone to do this for you. It may also assist you in deciding what you want from a facilitator.

A person centered facilitator can assist me by . . .

Which approach to developing my person centered plan would work best for me?

Who will facilitate my person centered planning meetings?

_____ me; _____ independent facilitator; _____ MRDD service coordinator.

If the person is not me, the name of the person I would like to facilitate my plan with me is: _____

Other key tasks to get ready for planning

In addition to selecting a facilitator or electing to facilitate your own plan, there are several other preparatory tasks which need to be done to get the planning started. If

you have asked someone to facilitate your plan, they might be helpful in accomplishing these tasks. A friend or family member would also be a good sounding board.

1.) The first task is to define the changes you want to accomplish as you begin planning. Think of this as your agenda. Perhaps you are interested in a different job or career or becoming more involved in your church. Ask yourself what you want to be different. This will provide a starting place for the planning. You can finish the following statements to get clearer about your agenda, such as:

- I have always wanted to...
- If there is one thing I really want to change, it is..
- I wish that...
- Why can't I ever...

2.) Next you need to consider who to ask to participate in your plan. Who are people that know you and are willing to do the work necessary to accomplish the goals you set. The next page gives you some ideas to consider as you select your planning circle. As you think of people, consider family, friends, co-workers, neighbors, people you know from your church, acquaintances from different clubs or organizations, etc. Use the worksheet on page 11 to write down people you wish to invite to plan with you.

3.) There are some logistics which you need to address, such as a place, date and time for meeting. Some people host their planning meetings in their home. Others use a meeting room at a local community setting, such as a church or a library. Some people prefer to meet outside at a park. Select a place where you and your planners will be comfortable. Give some thought also to a day and time that will work for those you have invited. If people work during the day, the meeting may occur in the evening, for example. How will you invite people to your planning meeting? Options include phone calls, emails, mailed written invitations or face to face invitations. Ask for help from someone if you need help making the invitations.

4.) Finally, think about ways to make planners feel comfortable. Have refreshments and comfortable chairs. Place posters on the walls or pictures or photos. Again, if you are working with a facilitator, they can help you look at these predatory issues. Use the worksheet on page 12 to write down your ideas for preparing for the planning meeting.

PEOPLE I WANT TO INVITE TO HELP ME WITH MY PLANNING

- **Who listens when you talk about what's important to you?**
- **Who keeps your needs and hopes from being ignored?**
- **Who treats you with respect?**
- **Who do you rely on and trust?**
- **Who stands by you through thick and thin?**
- **Who is willing to help you achieve your dreams?**

Based upon your responses to the above questions, complete the map on the following page listing people who you think will listen to you and help you with your future planning.

NAME _____

RELATIONSHIP

This image shows a single page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.[illegible]

11

Planning Next Steps

Convening your circle of support!

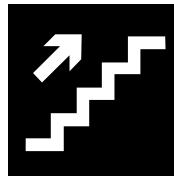
Next Steps
Who is going to facilitate my plan?
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
What is the agenda?
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
Where and when to meet?
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
How are you going to invite people you have identified to assist you in your planning?
<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

How your plan works...

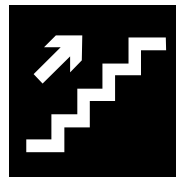
Every person centered plan is different; each plan is tailored to the individual. Nonetheless, there should usually be a particular progression in any one's plan.

STEPS IN THE PROCESS

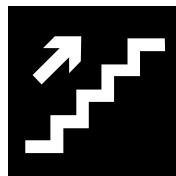
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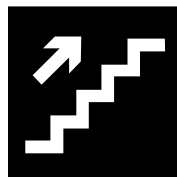
Working the plan



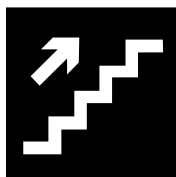
Developing action steps



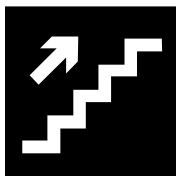
Designing and creating
the supports I need



Creating a vision of the future based on
my hopes and dreams



Learning together about me



Preparing to Plan

This page (in whole or in part) were reproduced from Missouri Parents Act (MPACT) Transition to Empowered Lifestyles training modules that were created in partnership with the University of Missouri Kansas City Institute for Human Development. Funding was provided by the U.S. Department of Education, Office of Special Education and Rehabilitative Services, Rehabilitation Services Administration.

This section gives you information about each part of planning and some different ways in which the information could be gathered or organized.

1. **Learning about me.** At the beginning of the planning process, it is usually a good idea to make sure that your planners have a clear picture of you. They should be aware of your interests and talents, where and with whom you like to spend your time, and the important people in your life. They should know what works for you and doesn't; your ideas about the future; hopes and dreams as well as your fears or concerns. It is also helpful to hear from those who know you since our friends and family often can reveal information or insights which we may not be aware of. There are many ways to put this personal picture together and you will work with your facilitator if you choose a series of questions which will achieve this. Some of the typical maps which are helpful include:

- Sketching your life story
- Looking at a typical day
- Looking at people in your life
- Mapping places where you spend time
- Itemizing choices you make yourself vs. choices others make for you
- Listing the things that work and don't work for you

The information which you seek to put together will probably depend on your planning agenda and what information is helpful to move your agenda forward. Bear in mind that you need not share any information which you do not want to share. This phase of planning may be brief if many of those you have invited already know you, or more lengthy if people know you less well.

2. Creating a vision of the future. In this phase of planning you and your planners begin to translate what is important about you into ideas about the future. One of the keys here is that all of the ideas should clearly fit with what makes sense to you and what people know about you. Many of these ideas may be related to your agenda, but new ideas may emerge as well. Some ways to generate or summarize this part of the planning might be:

- Listing hopes and dreams
- Asking people to generate a list of ideas about the future
- Detailing "my perfect job" or "a home for me"
- What would my ideal day look like?

A key in this phase of planning is to look at what makes sense without worrying yet about how it will be accomplished.

3. Looking at support and resources. In this part of the plan you and your planners explore ideas about what is needed for you to be successful. In this part of the planning it is often helpful to look at a particular activity or event and determine what if any assistance you might need. For example, what help might you need to be successful in a career? If transportation is a needed resource, you and your planners would list as many options as possible to support you in getting to and from work. Another part of this phase of planning involves designing a back up support plan as discussed earlier.

4. Action planning. Each meeting with your planners should conclude with an action plan. This is a list of what you or others will do to gather information or move towards achieving a goal. If one of your goals, e.g., is to become a homeowner, action steps would include: talking to people in order to find a realtor, developing a budget, exploring options for maintaining your home, etc. Each action step should identify who is responsible and a timeframe for accomplishing that step.

5. Working the plan. Working the plan refers to engaging in the action steps. Remember, your plan is not just a series of ongoing meetings; it is a series of actions which lead to accomplishment of particular goals. As particular goals are accomplished, new goals may emerge. Good person centered planning is never finished.

How can you tell the difference between a real plan and a false plan

A real plan

- your agenda
- you choose the people
- you and your planning team are working on your agenda
- accomplishments
- celebration
- about my life

A false plan

- one meeting a year
- planners are mainly professionals
- programs drive the plan
- nothing seems to change
- a drudgery
- about a document

Person Centered Planning Process Summary

Name: _____

Outcome/Goal:

<input type="checkbox"/> Home	<input type="checkbox"/> Social/Relationships
<input type="checkbox"/> Work	<input type="checkbox"/> Health & Safety
<input type="checkbox"/> Rec/Leisure	

Related Activity To Accomplish Goal	Action Needed To Complete Activity	Timeframe	Responsible Person/Party

My Typical Schedule or "Best Case Scenario"

Individual's Name: _____

Planning Date: _____

Staffing Plan Start Date: _____

Staffing Plan End Date: _____

Time	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Note
12:00 AM								
1:00 AM								
2:00 AM								
3:00 AM								
4:00 AM								
5:00 AM								
6:00 AM								
7:00 AM								
8:00 AM								
9:00 AM								
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4:00 PM								
5:00 PM								
6:00 PM								
7:00 PM								
8:00 PM								
9:00 PM								
10:00 PM								
11:00 PM								
CODE	HOURS	# OF WEEKS	TOTAL HOURS	RATE	TOTAL EXPENSE			COMMENTS
FAM=FAMILY	0.00		0.00		\$ -			
FR=FRIENDS	0.00	0.00	0.00		\$ -			
S=SELF	0.00	0.00	0.00		\$ -			
C=COMPANION	0.00	0.00	0.00		\$ -			
SCH=SCHOOL	0.00	0.00	0.00		\$ -			
P=PAID STAFF	0.00	0.00	0.00		\$ -			
O=OTHER	0.00	0.00	0.00		\$ -			
W=WORK	0.00	0.00	0.00		\$ -			
TOTALS	0.00		0.00		\$ -			

From: Ric Crowley, 1999 MACROW; ALLEGAN MASTER TEMPLATE – 168 Hour Schedule

Quarterly Support Plan

Name: _____

Outcome/Goal: _____

How this is linked to my person-centered plan: _____

<input type="checkbox"/> Home	<input type="checkbox"/> Social/Relationships
<input type="checkbox"/> Work	<input type="checkbox"/> Health & Safety
<input type="checkbox"/> Rec/Leisure	

Related Activity	Completion	Support Need	Intensity		Source of Resources		
(Temporary or Ongoing)	Date		Frequency	Duration		Paid	Unpaid