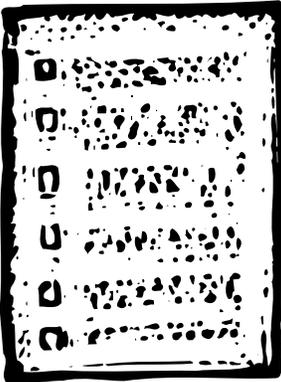


Appendix 2

A Checklist for Developing A Plan

4th Edition
Developed by
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A Check List for Developing a Plan

This checklist is intended to help you use the workbook, “Families Planning Together”. (The workbook should be used while referring to an example of a plan. If you have a copy of the workbook without an example of the plan contact the authors for assistance.) The checklist should help remind you of what needs to be done and the order in which you should do it. As you use the checklist remember that it is just a set of suggestions. Where what is written does not make sense for the person or circumstances, do what makes sense.

To use this checklist, keep in mind that each stage corresponds to a specific section of the workbook. As you complete a section, check it off on the list. When you have several boxes checked in both stages 1 and 2, you are ready to begin stage 3.

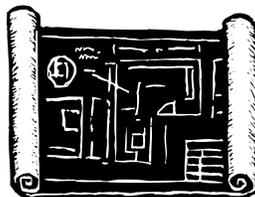
If you want other people to write on the plan then you need to make it “easy” to do. You not only need to make it “easy” by building in space for writing but by also leaving some “easy” learning for others to do. If you collect everything everybody knows and put it in your first plan there will be nothing left to write until the person tries something new or changes their preferences. Don’t try to learn everything everybody else knows. Learn enough to create a framework in which other people can write what they know.

An exception to this “rule” occurs when you (and perhaps 1 or 2 others) are the only people who know how to support your son or daughter. Then you are going to try to write down everything important that you have learned as a safeguard. But even here you do not have to write it all down at once. Write down enough to give you a good start and create your own frame for learning and add as you remember and notice things about what is important to the person and what others need to know or do.

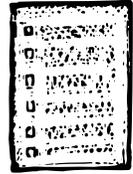
Stage 1 - Thinking about what you want to learn

Have you answered the following questions?

- What do you want the plan to accomplish?
- How can the person with whom you are planning best participate in the development of the plan?
- How to make sure that the process feels respectful to the person with whom you are planning?
- Who else needs to participate/agree so that the plan is implemented?
- Who knows what it takes for your family member to be happy?
- Who understands the issues of health or safety (if any) that your family member has?



Stage 2 - Gathering information



Do you have information recorded in several of the following areas:

Learning who to talk to

- Do a simple “relationship map” with the person (if your family member does not communicate with words fill it out as you think they would, ask others who are also close to the person if they agree with your information)

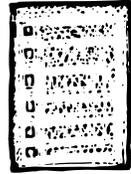
Learning from your family member: pages 21 to 29

- Great things about you
- What you like to do (favorite things/things you don’t like to do)
- The best/worst week day information sheets
- The best/worst weekend information sheets
- The positive rituals survey

Learning from those who know the person: pages 30 to 69

- Learning who to listen to: Using “Talking with people who know and care: an individual interview”
- The “unlimited power” questions;
- Two minute drill;
- Great things about this person;
- What he or she likes to do (favorite things/things he or she doesn't like to do);
- The best/worst week day information sheets;
- The best/worst weekend information sheets;
- The positive rituals survey.
- The *communication chart* (when the person does not use words to talk or communicates in atypical ways)

Stage 3 - Developing a first plan



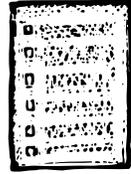
After you have completed some parts of stage 2, you will be ready to start this stage.

Using what you have learned to write a first draft

- Look at the answers to the “like the most”, “admire the most”, and “great things about you” questions and see which answers should be in the section called *What Others Admire About . . .*
- Look at the “people” or relationship map and see who is important to the person and how important.
- Look at the favorite things, best day/worst day, and positive rituals information and ask what that tells you about what is important to the person and how important each item is.
- Look at the answers to the “unlimited power” questions and ask what that tells you about what/who should be present or absent in the person’s life and how important those things/activities/people are.
- Look for agreement among the people that you interviewed. Where there is agreement you can feel more comfortable that the information is probably accurate.
- Who else do you need to talk to/get information from? What is the easiest and best way to get that information
- What questions do you still have? What issues still need to be resolved? Make a list of the things to be figured out.

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Did you remember to:



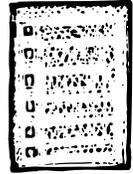
- Separate what is important to you from what is important to the person?
- Include what needs to be absent from the person's life, what they dislike?
- Include all of the details of rituals/routines, only if the person needs a lot of assistance in getting things done and can't tell people how they want it to happen.
- See if the plan has information that the person does not want everyone to know. If it does, develop "public" and "private" sections of the plan.

Going from first draft to first plan

- When you have a draft you think meets first plan criteria ask someone you are comfortable with to read the plan to see how well it communicates. Ask the reader to share all of his/her questions. This will help you with clarity.
- Don't forget to review your draft with the person

General rules for your next draft are:

- Use complete thoughts but not necessarily complete sentences;
- Use common, everyday language rather than the terms and abbreviations used by government and community agencies that support people with disabilities;
- Make sure that each item listed has enough detail and/or enough examples that someone newly present in the person's life would understand what was meant;
- There are no long "laundry lists" of items, those that go together are grouped together, with a space between groups; and
- Where there are 4 or more things grouped together there is a topic statement followed by the group of items with bullets.



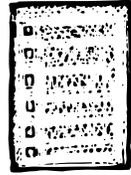
Guidelines to use in writing each section of the plan

- In the **administrative section** (or cover page) the reader should learn:
 - Whose plan is it;
 - When it was done;
 - What is the purpose of the plan;
 - Who contributed;
 - Who still needs to contribute; and
 - Anything else that is required by your local administrative entity.

- **Introduction - Great things about this person** should list what other people like and admire about the person.
 - It should list things that we might like or admire about anyone of roughly the same age.
 - It should not include things that we only say about people with disabilities or is “faint praise”.
 - It should use the same type of language we use to introduce new friends or neighbors.
 - Where there are more than 6 or so items listed they should be grouped to

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make it more likely that they will be read.



- **What is important to the person**, this section describes what the person perceives as being important to him or her.
 - It must not include items that others think should be important to the person. (These are things that are important for the person and may be used in the next "support" section.)
 - It should only include those things that the person tells us are important (with words or behavior).

- These should include what the person sees as important in -
 - Relationships,
 - Things to do,
 - Places to be,
 - Rituals and routines

- In the "**characteristics of people who best support**" section, the reader learns about who should be working with your family member. What are the characteristics that you should look for? For example, Katherine's section includes: "enjoys being silly; and, comfortable with sharing personal space." These are things that a support person must "come with" and cannot be "trained."

- The section what others need to know or do support, clearly describes what you expect people who provide support to do so that your family member is likely to have more good days. Where there are four or more items that are similar, use one statement to introduce the 'theme' followed by bullets with the details. Use blank lines to separate distinct thoughts.



In this section, the reader learns what others need to know or do:

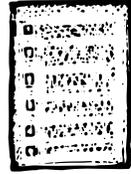
- So that the person has what is important to him or her; and
 - What is important for him or her; with
 - What is important for being looked at in the context of what is important to her or him; so that
 - There is a good balance between what is important to and what is important for the person.
 - This section of the plan is written with sufficient detail so that those responsible for providing the support will get it right.
- The section what others need to know or do to keep . . . healthy and safe should include:
- Information about the health professionals that the person sees.
 - Information about medication and side effects that the person has experienced or could experience.
 - Information about allergies.
 - Special instructions about how a person swallows, or the help they need to avoid choking.
 - Any other issues that others should know about in order to keep the person healthy and safe.

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- The **things to figure out section** is a running list of questions that you need to answer or issues to be resolved. It is intended to help you:
- Keep track of issues you don't want people to forget;
 - Write down questions that you know must be answered, but that you don't want to stand in the way of getting the "First Plan" written; and
 - Think about what could help in complex or complicated issues.
- The **action plan** (if you need one) should describe who is going to do what to help people move toward the life that they want and stay healthy/safe. It often describes what needs to be maintained as well as what will be changed. The reader should know:
- What is to happen,
 - who is responsible,
 - the date by when it will happen, and
 - how will you know it has happened.

Sample Action Plan Format		
What?	Who?	By When?
How will we know it happened?		

Stage 4 - On-going learning and using what has been learned



Continuing the learning and recording what you learn -

- Who else needs to contribute? What is the best and easiest way to get their contribution? Some of the ways listed below may work. Remember that you can use just one of them or combine them -
 - Continue to interview people
 - Send some of the information gathering pages from the manual
 - Send parts of the draft plan for them to write on
 - Have an information gathering party

- How are you going to record the on-going learning? People change and our understanding of them deepens over time. You need to have easy ways to record this learning or it will be lost. Think about who will be doing the learning and what way(s) of recording it will be easiest for them. Look at the ways that are listed below and think about what will work best for you.
 - As you learn new information, write it down in the white space on the right side of the plan. Write down questions on the right side of the plan, where you think there is learning to do. Make multiple copies of the plan and ask those involved to write their impressions on the plan. Gather these copies as makes sense and enter the learning on the typed side.
 - Get copies of the plan to the people who will be doing the learning, with questions written on them. Interview them as you write notes and transcribe it on to the plan.
 - Have periodic gatherings of those people who care about the person and ask them what they have learned. Take notes and transcribe the learning onto the plan.



Using the plan (acting on what was learned)

The purpose of developing a plan is to help the person move toward the life that they want while addressing any issues of health or safety. For people who are not getting paid services this process can be very informal. For people who receive paid services the process of planning and review often have federal and state requirements. While essential lifestyle plans can be (and are) written to meet these requirements, some changes and additions are usually needed. Every agency also has its own planning format and develops and updates the plans through a formal meeting process.¹ However, regardless of the process, any gathering of people who are looking at the future should seek to answer the following questions. Since the last time we got together -

- What have we tried?
- What have we learned?
- What else might we try?
- What else do we need to learn?
- What do we need to do next?

In many instances there needs to be a process that helps people summarize the learning and then go to a description of how they are going to act on what they have learned (referred to as an action plan). One way “bridge” from learning to action is to summarize what has been learned in a section of the plan called “what does and does not make sense”. After people have looked at what they learned and what they

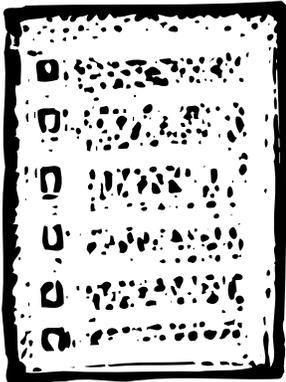
¹ All agencies have their own planning formats. Most agencies are happy to use the information in the essential lifestyle plan to help determine how to begin to support someone. However, all of them will then use their own planning format. It may be helpful to see your challenge as getting the agency to use the learning rather than getting them to use the format.

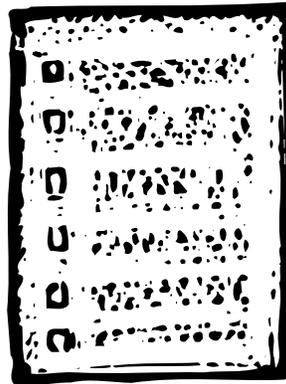
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have tried, they are asked to develop a “snapshot” of where things are now.² To do this requires 2 separate skills. Those participating need to be able to look at the current situation from the perspectives of the person, those paid to support and (where their perspective is different) family members. The second skill is the ability to tease a situation apart so that both what makes sense about it and what does not make sense is described from each perspective.

Finally there needs to be a description of what is going to be done to maintain those things that do make sense, address those that do not make sense, and answer the questions in the “things to figure out” section. This description of activities is called an action plan and a format for it is in the computer template and at the end of the sample plans.

2 A more detailed description of this process is available from the authors.





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Checklist for Developing A Plan**

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