



**Utah
Parent
Center**

**Special needs,
extraordinary potential**

Six Steps for Person-Centered Planning

Don't know where to start? This six-step process will help you get started with person-centered planning. There is no one "right" way to do the planning, but these guidelines are based on a large amount of experience, research, and best practice. Whether you are creating your own process or working with an agency that serves your family member, the same principles apply.

1. Choose a planning team

Brainstorm with your family member with disabilities and create a list of potential team members. Think about trustworthy people who will listen to your family member who might commit to participating for a period of time. Think about family members, friends, neighbors, individuals from work or school, service providers and so on.

See our information sheet on choosing and managing the team for more ideas about who can support you in this process.

2. Gather information.

Information gathering can start early—even before the team is recruited.

Create a profile of the person and share it with the team members—possibly even before the first meeting. A pre meeting of some team members could be held to create the profile. The profile will be especially helpful to members who do not know the individual as well, and it will help all team members to have a common understanding. The profile should be a living changing document that can be added to as needed. See our supplementary materials for resources for creating a profile.

What should be on the profile? Include whatever is important about the individual. Some things to consider including:

- The family's background, culture and beliefs
- Critical events in the individual's life

- A medical history and current medical issues
- Major developments in the individual's life
- Important relationships
- Talents, capacities and desires of the individual
- The individual's preferences and dislikes, goals, dreams, and vision for his or her life.

3. Choose a Facilitator, and then plan and hold a team meeting

Planning for the first meeting starts with choosing a facilitator.

- The facilitator should be a trusted individual who will work to discover the dreams and capacities of the individual and build the community that is needed. Training and skills for running meetings and handling conflicts are very helpful for a facilitator. The facilitator could be a family member a professional or even a hired consultant.
- The facilitator, individual and family should finish recruiting other team members.

Once the facilitator is chosen, a personal profile is developed and team members are recruited, a date time and place for the meeting can be decided upon and the agenda can be developed.

You are now well prepared to hold a productive meeting. The first meeting doesn't need to be perfect. It is just the first meeting, so go for it!

4. Share information

The agenda should include information items to be discussed. Information sharing is an ongoing process that happens at the meetings and sometimes between meetings. There are times when new agenda items that need to be responded to may come up in a meeting, so be prepared to be flexible if appropriate.

- When sharing information, remember whose plan it is. The sharing could include discussing and even adding to the profile, identifying needs, and envisioning the future desired by the individual.
- A natural next step is to identify any obstacles –not to discourage anyone, but for the purpose of identifying strategies and possible action steps.
- Identify strategies and action steps. This may mean you need to make assignments to gather additional information and resources and discuss them in future meetings. This will be an ongoing process.

- The items discussed will be unique to each individual. Be sure to encourage the individual to speak up first by encouraging him or her to participate and then by listening to and respecting and implementing the individual's ideas. The process will not work if the individual sees that his or her ideas are not taken seriously.

5. Develop a written plan

See our resources for various formats that a plan might follow. There is no one right way for the plan to be organized, but remember that if it is not written down, it didn't happen. A written plan is critical for communication and follow through.

There are many difficult and meaningful decisions that can go into a plan—things like:

- Where the person will live
- Who will work for the person
- Who controls the money
- Health Care decisions
- Lifelong learning decisions
- Where the individual will work
- If the individual will marry
- Guardianship or alternatives to guardianship
- Retirement plans

Each of these choices and many others should be personal choices.

Remember the vision of the plan should develop from the understanding of the core values of the individual. Focusing on the person creates flexibility

Each of these topics is huge, so depending on what is needed, please consult the UPC and other resources for information about any of these areas. Working on these areas will be an ongoing process and many things will unfold and change over time. The important thing is to start.

Action will be required to have the plan come to fruition. The plan should contain measurable goals and be written in a format that shows:

- What the goal or action is,
- Who is responsible to follow through for each goal,
- When the goal should be completed,
- Information on how the goal will be accomplished, and
- How you will measure if the goal has been accomplished

A copy of the action plan should be given to each team member, and plans should be made for checking in and for the next meeting.

6. Follow up

Following up might be the most critical step. Careful attention should be paid at each meeting to planning for follow up.

- Put someone in charge of following up. Remember, simply creating the plan will not change the person's life.
- The person in charge should check the progress of team members as they work on their assignments.
- The team members should be clear about who is in charge whether it is, for example, a family member, case manager, or the team facilitator.

Following these six steps will go a long way toward creating success in planning a happy and successful future for your family member. It will require commitment and follow through on everyone's part, but the payoff will be more than worth the effort. And remember, the process can be used for people with all kinds of needs and can be customized to work for your family member.

Resources:

A manual for the person-centered planning facilitator: <https://rtc.umn.edu/docs/pcpmanual1.pdf>

A free downloadable resource with various styles of planning documents and information on creating a person-centered plan: https://www.dds.ca.gov/RC/docs/IPP_Manual_Chap4a.pdf

Samples of children's profiles for person-centered planning: <https://factoregon.org/person-centered-plan-samples/>

A presentation on writing measurable goals for person-centered planning: <https://www.macmhb.org/sites/default/files/attachments/files/2016%20HCBW%20Conference.pdf>

A sample of a real person-centered plan shared by an adult self-advocate: <https://www.c-q-l.org/files/2017Documents/Person-Centered-Plan-Sample-VLK.pdf>

A short video of a person-centered planning meeting for a youth with a developmental disability: <https://www.youtube.com/watch?v=Xzco2nT3pOc>

An excellent presentation on a process that was used to successfully plan for a higher functioning transition aged youth involved with the justice system: <https://www.youtube.com/watch?v=FMmdyfQGCj4>

Andrew's Story, a short video success story of planning for an adult: <https://www.youtube.com/watch?v=1w6l31iySx8>

Jeff's Story, a short video success story of planning for an adult: <https://www.youtube.com/watch?v=LiTcUi5K6Mc>