

Person-Centered Planning Checklist

Directions: Complete this checklist while supporting an individual during the planning process or use it as a self-review after the process is completed. Mark each item that reflects the CURRENT process used. Do not mark items that “should” be done or that the team “intends” to do. The tool should reflect current practice, and, when completed again in the future, it can recognize progress or change.

Scoring: Each marked item has a value of 1 (one). To calculate subtotals, count the marked items in each section. Add the section subtotals to get the total score. The maximum score is 27.

Recommendation: Complete the checklist prior to implementation so you have a baseline score of how the service currently supports people through the planning process. Then complete the checklist again on a regularly basis (e.g., monthly) to track change over time. You will likely see an increase in total score as you move through PCCP training and implementation.

Initial Conversations

- With the person, decide if and when they would like to work on any assessments and/or discuss their quality of life (QOL).
- Complete the assessments and QOL discussion with the person. This may be part of a preparation meeting.
- Ask the person when, where, and with whom they want to prepare for their planning meeting. Would they like any support contacting people and/or scheduling the preparation meeting?
- Support the individual in identifying when, where, and with whom the planning meeting should take place. Would the person like any support contacting people and/or scheduling the planning meeting?
- Ask if the person would like to choose an ally to help them prepare for the meeting and/or bring to the meeting for communication or moral support? If so, whom? And would they like support in engaging this ally?

Initial Conversations Subtotal (Max 5) _____

(continues)

The Meeting Preparation

- Determine what topics or QOL domains matter most to the person.
- Support the person in choosing and communicating the areas they want to focus on during the meeting. This may include identifying areas that are less important to the person. (Follow all HIPPA regulations in sharing personal and confidential information)
- Discuss how they want to express themselves at the meeting. What tools or communication technology will they need? Do they want to prepare information or input ahead of time? Would they like support getting the tools they need or preparing their input? If so, from whom?
- Decide which goal-planning approaches the person wants to use during the meeting. For example, do they want to discuss what is meaningful versus essential? Would they like to use visual or graphic aids?
- Gather all tools and complete all reports before the planning meeting.

The Meeting Preparation Subtotal (Max 5) _____

The Planning Meeting

- The environment is comfortable and accessible to the person and everyone they have invited.
- The person gives permission for all discussions, and discussions are centered on the person's input.
- The input of all those who love, care for, and support the person is valued, and each team member is respectful of the person and each other.
- All language and questions asked during the goal-planning meeting are respectful and person-centered.
- Efforts are made to reduce or eliminate program speak (e.g., community outings) and professional jargon.
- The support team understands the individual's plans and all discussions are clear to the person.
- The person has the final say on decisions, goals, and support plans.
- Goals are written in a respectful and person-centered way.

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- Everyone is clear on next steps and committed to their role in supporting the person and the plan.
- Person-centered practices and interactions are modeled and encouraged.
- Comments are restated, as needed, to use person-centered language and keep the focus on the person.
- Person-centered resources and education are offered to the support team as needed.

The Planning Meeting Subtotal (Max 12) _____

The Plan Itself

- Strategies support the lifestyle the person wants for their life today.
- Goals increase community involvement, not just community observation.
- Person has valued roles and relationships or has identified steps to achieve these (as desired).
- The plan is unique and clearly speaks about and represents the person.
- Follow-up calls are made as needed to fill in missing information not covered in the meeting. The person sees and approves any updates and changes before updates and changes are communicated to those involved in the planning meeting.

The Plan Itself Subtotal (Max 5) _____

Person-Centered Planning Totals

Subtotal Section 1, Initial Conversations _____

Subtotal Section 2, The Meeting Preparation _____

Subtotal Section 3, The Planning Meeting _____

Subtotal Section 4, The Plan Itself _____

Total of Sections 1 through 4 (Max 27) _____