

**Administration on Community Living (ACL) No Wrong Door System
Person-Centered Counseling (PCC) Training Program**

Course Title: Person-Centered Planning and Implementation

Lesson Number & Title: 9 Ensuring the Plan is Useful and Useable

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Narration:

Welcome to the lesson on Ensuring the Plan is Useful and Useable. This lesson is part of the course on Person-Centered Planning and Implementation in the Person-Centered Counseling Training Program. Please review the information on this screen and go to the next page when you are ready.

Text:

Welcome!

Here is a description of the lesson you are starting: It is important for a person-centered plan to be useful and useable. Once you have enough information and an understanding of the person's goals, you will help them organize this into the full plan. You may start on your own and bring it for review or approval. Or, you may do this with the person present the whole time. You will want to transfer the important details to a person's one-page description. You will help to describe goals and write action steps that have the SMART components. Before using the plan it should be carefully reviewed with the person and anyone else they would like to review it. This lesson will remind you of criteria that you can use to review a person-centered plan. By reviewing for these, you make it more likely the plan will be useful and useable.

Learning Objective:

After completing this lesson:

You will have strategies for reviewing person-centered plans to ensure they are useful and useable.

To view course information, including On-the-Job Training Assessments, Portfolio Assignments, and a list of Activities, click on the “Menu” tab and then click Lesson Information.

This course is one of the six foundational courses in the No Wrong Door System Person-Centered Counseling (PCC) Training Program meant to provide basic skill and knowledge related to the identified competencies for a PCC professional. Click on the box below to learn about how person-centered thinking approaches are infused throughout these courses.

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Narration:

Formal person-centered plans start with discovery for a purpose. Through that process, the components of the plan are filled in. Often this work will be done while the Person-Centered Counseling professional is with the person. However, at times you will refine, edit, or focus materials on your own. This is especially likely when finalizing the action steps, after a discovery session, or before getting ready to share the plan with others the person wants to see it. Remember that no changes to a plan should be considered final without the approval of the person. Review the information on this page. When you are ready, go to the next page.

Text:

Developing the Plan

You have worked with the person to identify aspects of the plan. At some point, it is time to stop developing it and use the plan to accomplish goals. After the plan is developed, a Person-Centered Counseling (PCC) professional may or may not have much interaction with the person or the plan. Sometimes you will be very engaged for a period of time. The plan may be a larger one with many steps. For example, focused on helping a person move or find a job. Or it may be something with a limited purpose. For example, communicating with daily supporters about what works best for a person. It may include other professionals and service providers. Or it might rely completely on natural supports. Whether it is simple or complex, you want the person and those supporting them to be able to use the plan,

on their own, and in an ongoing way.

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Narration:

Before putting a plan to use, the Person-Centered Counseling Professional and the person should review it with important criteria in mind. This should be done before considering the plan ready for sharing with others. It's important to make sure that information is clear and appears to be focused on things that are relevant and appropriate from the person's view. If not, it is unlikely to be used or useful. Review the information on this page. When you are ready, go to the next page.

Text:

Using Basic Criteria to Review the Plan

Plans do not have to be perfect to be useful and usable. In fact, no plan should ever be considered "final" since people change, their goals change, and their lives change. However, a good review of the plan, before sharing it with others, helps make sure information is person-centered, accurate, and helpful to the purpose.

In reviewing the plan, have the person consider the following and make changes as necessary:

- <bullet> If someone had never met you, would this information help them know the most important things about you and to you, related to the purpose of this plan? Are there things missing that we need to add?
- <bullet> Is there anything on this plan that doesn't feel right to you? Any words, images, or other information that don't feel true to you? Is anything not clear from your view? Is there anything you want to adjust or remove?

<bullet> Are these the goals that are most important *to* you? If you achieved these would there still be major issues or concerns you would have in this area? Do we need to adjust the goals?

<bullet> When you look at the action steps, do they feel realistic to you? Is there anything that you feel might get in the way of this happening? Are you feeling ready to take action on these items in the time period we have identified? Do you feel you have enough support to do this? Have we identified the right people at each step? Is everyone who volunteered to do tasks likely to be able to do them?

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Narration:

It can also be helpful to get the unbiased opinion of someone who has not been intimately involved in the development of a plan. A plan must feel accurate and focused from the person's view. However, the purpose of a plan is often to make a person's strengths and expectations in an area known to the people who will provide support. Within your own organization, you and your coworkers and supervisors can support each other by reviewing each other's plans. Review the information on this page. When you are ready, go to the next page.

Text:

Seeking Unbiased Feedback on the Plan

Person-centered counseling requires development of skills. A good plan should be easy to read and understand. The purpose of the plan should be clear. It should quickly help someone understand a person's strengths. It should quickly help others know how best to support the person and what their roles might be. Coworkers can help each other write good plans by being available to review and provide feedback as needed. This mutual review of plans can support the growth and development of everyone's skills. It can help clarify aspects of planning and support improved plans.

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Narration:

The Person-Centered Counseling professional has the responsibility of supporting development of a plan that is well-organized and person-centered. In addition to peer reviews, you should review your own plans and seek to make them as useful and useable as possible. Consider two aspects of review. One is the format and style of the plan. The other is the substance of the plan. Review the information on this page. When you are ready, go to the next page.

Text:

Review of Format and Style

The format and style of the plan must work for the people using it. Some people, especially the young people or visually creative, may prefer to use more images and graphics in a plan. They may want to use a variety of fonts or creative styles for presenting information. Others will prefer a simple, straightforward approach. Some people may be reluctant to make the plan their own with photos or by using their own words. However, these pieces do help others connect to the person more quickly and understand them as a unique individual. While the plan should represent the person's personality and preference, provide feedback on whether it helps others put the plan into action or is hindering their ability to use it. It's important to strike a balance.

Also include a review for the use of plain language to describe aspects of

the plan. There should not be any jargon, acronyms, or clinical terms. Information should be honest and complete. However, it needs to be strength-based, neutral, and written in a way that help people understand what to do to support the person in this area.

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Narration:

The look and style of the plan will have an impact. It changes how people interact with the person. When we use plain language framed around a person's strengths and how best to support them, supporters feel differently than they do reading through clinical language and labels. However, we must ensure there is substance as well as style in a plan. Review the information on this page. When you are ready, go to the next page.

Text:

Review of Substance

You want people to find the plans helpful. When it comes to substance of the plan, two things will be most critical. 1) Is the plan truly focused on the correct things, including the person's goals and what's important *to* them and, 2) Is the information specific enough for people to implement the plan?

Consider the following:

<bullet> When looking at goals and action steps, does it seem likely this these are important to the person and meaningful? Has any "fixing" slipped in?

<bullet> Have we included things that are important for the person, but in ways that are based on supporting rather than fixing? Have risks been clearly identified and support put in place based on what makes sense to the person and what they prefer? (This is known as addressing *for* in the context of *to*).

<bullet> Are all parts of the plan clear enough and concrete enough that people can actually do what is expected? Are the action steps likely to help the person achieve their desired goals? Is it clear what it looks like to achieve a goal?

<bullet> Are services and supports sufficient? Is every part of the plan clearly connected to an individual who is responsible to make it happen? Are the right people involved? Do they have the ability and commitment to follow-through?

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Narration:

Your goal is to complete a plan that is useful and usable to both the person and supporters. Follow-up will help you learn what works and does not work in developing plans. A plan that is focused on the right things, is easy to understand, and properly identifies resources should move forward. If people and their supporters are stalled out when you check in, you will engage discovery with them. You will also review and consider if the plan was well designed. Review the information on this page. When you are ready, go to the next page.

Text:

Activity on Useful and Usable Plans

No one is ever required to complete the actions toward their goals. On the other hand, if the goals are really theirs and the right approaches and resources are identified it is likely they will. Plans and especially action steps may be updated frequently in some plans. Complete this short activity and go on the lesson review.

Activity: Elements of a Useful and Useable Plan

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Narration:

Congratulations! You have now finished the lesson. Let's take a few moments to review the key ideas and learning objectives.

Part of the Person-Centered Counseling professional's role is to have experience and expertise in getting information and organizing it in a person-centered way. Transferring discovery from conversations to an actual plan can take some skill. A focus on the purpose and goals of the plan make it easier to decide what belongs in the plan. Consider both style and substance as you review plans. Make sure the person is involved and makes all the final decisions.

Please review the information on this page. You can also review the content as needed by using the "Left Arrow" icon at the bottom of the screen. This will take you back through the lesson. You may take the test now, later, or as requested by your employer. Good luck and thanks for completing the lesson!

Text:

Conclusion and Lesson Review

- <bullet> Support people in transferring information obtained in discovery into a complete plan.
- <bullet> Before the individual is ready to share the plan with others, review it carefully. Consider its usefulness both to the person and others who will use

it.

<bullet> Style and format is up to the person. Some people will have strong opinions. Others will not care too much. Help the person consider what will work best to help supporters be able to use the plan as well.

<bullet> Substance issues include whether the plan truly reflects the person's views and is specific enough for people to be able to carry it out. You, the person, and perhaps others can review it for substance. The person will make all final decisions.

<bullet> Writing good plans is not as easy as it first appears. Work with coworkers to support each other in writing better plans. A lack of progress during follow-up is a sign that something in the plan is not working. Try to learn what works and doesn't work from each plan you develop.

Reflection on Learning Objectives

Directions: Review the objective(s) on this page. When you are done click on the "My Notes" icon at the top of the screen to use the electronic journal or use your own notebook. Write down your answers to the following questions.

1. What did you learn in this lesson that you felt was important?
2. What will you do differently because of the content in this lesson?

Learning Objectives

After completing this lesson, you will have strategies for reviewing person-centered plans to ensure they are useful and useable.

If you are ready to take the test, click on the "Take Test" tab. You can also take the test later: It will be available from your "Personal Page." To access it, click on the "My eLearning Lessons View" button. Choose the lesson title from the list of assignments, and then click on the "Start the Lesson" button at the bottom of the screen. Click the "Take Test" tab to start the test.

We recommend that you complete the On-the-Job Training Assessments and Portfolio Assignments for this lesson. They will help you demonstrate competencies for the ideas presented. To view On-the-Job Training Assessments, Portfolio Assignments, and a list of Activities, click on the

“Menu” tab and then click “Lesson Information.”

Again, congratulations and good luck!

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