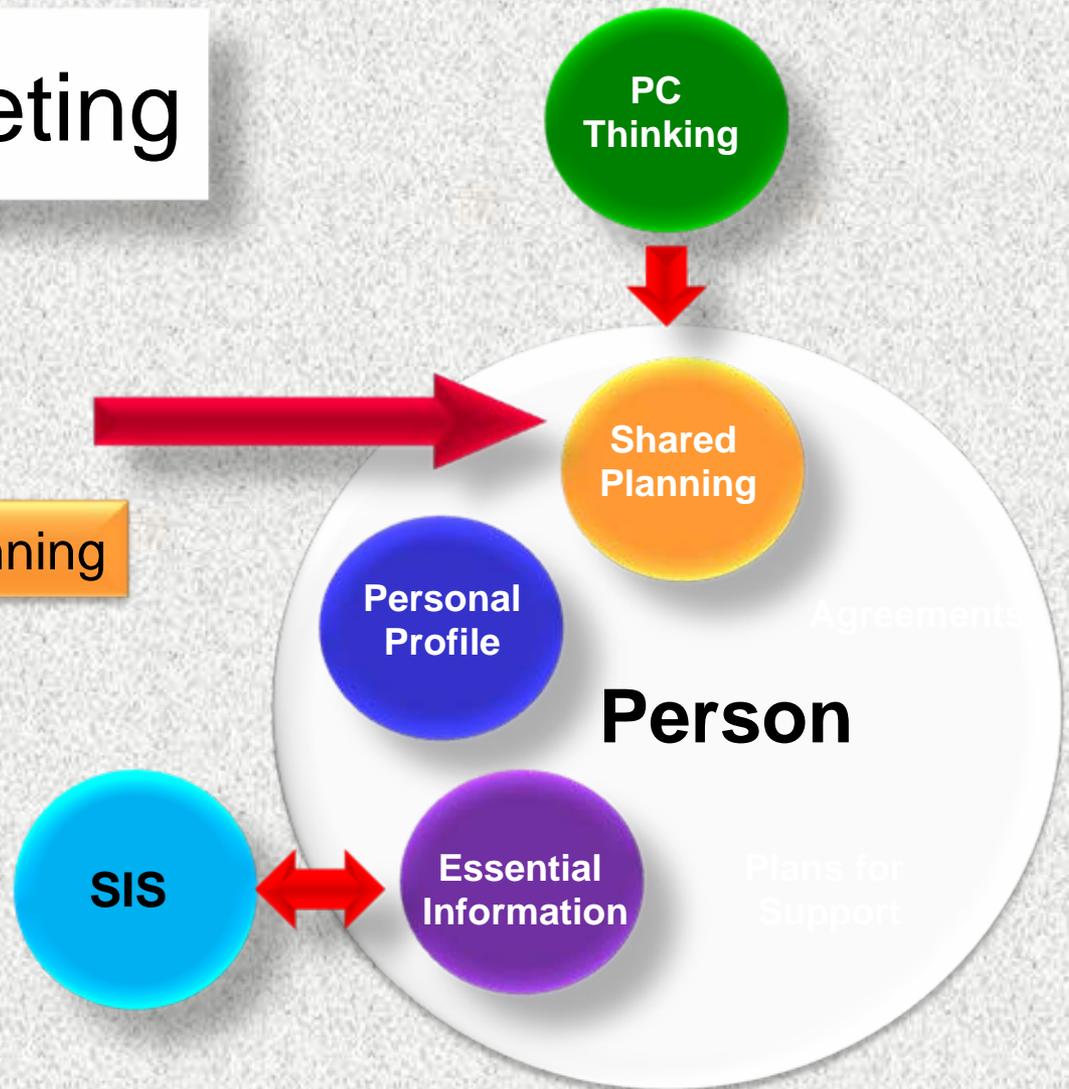


Module 3: During the Annual Meeting

Developing a PC ISP – October 2009

During the Meeting

Part III: Shared Planning



Part III: Shared Planning

Part III. Shared Planning

<u>Outcome</u> •	What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?
<u>Outcome</u> •	What is IMPORTANT FOR ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?



Assign Roles

A volunteer team member or the support coordinator records Shared Planning at the meeting.

Another volunteer helps keep time.

Suggested Agenda

The meeting begins by sharing the good things that have happened in the person's life and sharing roles for the meeting. 1

The individual shares his or her Profile with support as needed or desired. 2

Partners offer ideas and suggestions for the Profile and the recorder types or writes the additions based on individual and team agreement. 3

Suggested Agenda Continued

The recorder lists what's important TO and what's important FOR planning this year on Part III, Shared Planning.

4

The team develops desired outcomes that are specific and measurable adding the frequency and who will support the individual in each instance.

5

All team members answer the Agreement Questions and any unresolved issues are listed.

6

All Partners sign in agreement.

7

6

It's important to ask...



What needs to change?

What needs to stay the same?

and

**Are we finding a balance between
what's **important TO** and **what's
important FOR**?**

Part II. Personal Profile

Home	
What's working? <i>Things I would like to stay the same</i>	What's not working? <i>Things I would like to see changed</i>
Home <i>Living in the same place as Joe and Jerry.</i>	<i>Living with too many people (8 in the home) and a roommate who doesn't like him to play his music after 9 p.m. If he wakes in the night, he wanders around, because he "can't sleep" and is "grumpy the next day.</i>
Routines <i>Breakfast and dinner with Joe and Jerry.</i>	<i>Having his morning routine not go as he likes. Not being able to do things when he wants to do them. Helping Jack with what he can do himself. Not giving him privacy. Putting on shirts that have tags that scratch his neck. Not getting to sit on the porch with his coffee.</i>
Independence <i>Making his own decisions about when to stay home and when to go to the day program. Helping John Turner (the contracted lawn service) in the yard.</i>	<i>Not being able to work in the yard or go places in the community when he'd like to.</i>

What's important TO Jack this year?

The recorder then adds what's important to the individual in the “important TO” column of Shared Planning.



Part III. Shared Planning

<u>Outcome</u> #	What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How o or b when

AND...what's important for the individual in the “important FOR” column of Shared Planning.



<u>Outcome</u> #	What is IMPORTANT FOR ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?

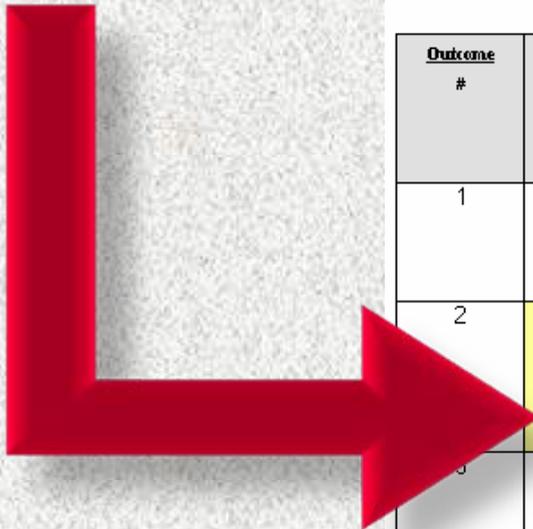
Part II. Personal Profile

Home	
What's working? <i>Things I would like to stay the same</i>	What's not working? <i>Things I would like to see changed</i>
Home <i>Living in the same place as Joe and Jerry.</i>	<i>Living with too many people (8 in the home) and a roommate doesn't like him to play his music after 9 p.m. If he wakes up at night, he wanders around, because he "can't sleep" and is "grumpy" the next day.</i>
Routines <i>Breakfast and dinner with Joe and Jerry.</i>	<i>Having his morning routine not go as he likes. Not being able to do things when he wants to do them. Helping Jack with what he can do himself. Not giving him privacy. Putting on shirts that have tags that scratch his neck. Not getting to sit on the porch with coffee.</i>
Independence <i>Making his own decisions about when to stay home and when to go to the day program. Helping John Turner (the contracted lawn service) in the yard.</i>	<i>Not being able to work in the yard or go places in the community when he'd like to.</i>

In this manner
important TO
and **important FOR** items are
transferred to
Part III.

Part III. Shared Planning

Outcome #	What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?
1	<i>Privacy and time alone.</i>	<i>Jack has time away from the others at home and at the day program to do something he enjoys on his own.</i>	<i>Daily</i>	<i>Residential: River Creek, LLC. Day Support: New Adventures</i>
2	<i>Following his own routine every morning.</i>	<i>Jack has a calm and relaxed morning routine, with time after breakfast for sitting on the porch or something else he enjoys.</i>	<i>Daily</i>	<i>Residential: River Creek, LLC.</i>
3	<i>Gardening.</i>	<i>Jack helps plant and tend a vegetable garden.</i>	<i>Weekly</i>	<i>Residential: River Creek, LLC. Day Support: New Adventures Support Coordinator: Oakridge CSB</i>



Garner, Jack

Date SIS completed:

02/25/2009

SIS

Most Important To the Individual

Sect 1, Part A Item 3	Preparing food	3	2	3
Notes:	Jack likes to try new foods.			
Sect 1, Part A Item 7	Bathing and taking care of personal hygiene and grooming needs	3	1	3
Notes:	T - Jack likes a standard routine in the mornings. F - Jack needs support in the shower with setting the temperature and washing his hair and back.			
Sect 1, Part B Item 2	Participating in recreation/leisure activities in the community settings	2	3	3
Notes:	Jack likes walking around his neighborhood to go shopping and see friends.			
Sect 1, Part B Item 4	Going to visit friends and family	2	2	2
Notes:	Jack has friends he likes to see every Sunday for coffee.			
Sect 1, Part E Item 7	Maintaining physical health and fitness	3	2	2
Notes:	F - Jack benefits from regular exercise due to his diabetic condition. T - He likes walking and lifting weights.			
Sect 1, Part F Item 7	Engaging in loving and intimate relationships	2	1	3
Notes:	It is important TO Jack to stay in touch with friends and family.			

Most Important For the Individual

Sect 1, Part A Item 2	Taking care of clothes includes laundering	2	3	3
Notes:	Jack needs support with sorting and washing clothes.			
Sect 1, Part A Item 5	Housekeeping and cleaning	2	2	3
Notes:	Jack needs support to keep his home clean.			
Sect 1, Part A Item 7	Bathing and taking care of personal hygiene and grooming needs	3	1	3
Notes:	T - Jack likes a standard routine in the mornings. F - Jack needs support in the shower with setting the temperature and washing his hair and back.			
Sect 1, Part E Item 1	Taking medications	3	2	3
Notes:	Jack needs support with medications including insulin injections and blood sugar checks.			
Sect 1, Part E Item 2	Avoiding health and safety hazards	3	2	3
Notes:	Jack needs monitoring and reminders not to walk alongside the highway near his home.			
Sect 1, Part E Item 6	Maintaining a nutritious diet	3	2	3
Notes:	Due to diabetes, Jack needs support identifying foods that are healthy for him to eat as prescribed by his doctor.			
Sect 1, Part E Item 7	Maintaining physical health and fitness	3	2	2
Notes:	F - Jack benefits from regular exercise due to his diabetic condition. T - He likes walking and lifting weights.			
Sect 3, Part B Item 10	Prevention of wandering		2	
Notes:	Jack likes to walk along the highway to go to Krispy Kreme. It's important that he have someone with him for safety.			
Sect 4, Item 16	Chronic medical problems (e.g. diabetes, congestive heart failure, COPD, asthma, constipation)		2	
Notes:	Jack has diabetes and needs support with diabetic care. Checking blood sugar and providing insulin needed daily.			

The Profile and the Essential Information (including the SIS Report) are reviewed to identify what's **IMPORTANT TO** and what's **IMPORTANT FOR** planning.

AAIDD

Supports Intensity Scale Report **SIS**

Confidential Interview and Profile Results for the Supports Intensity Scale (SIS)

Last Name: Garner
First Name: Jack
Middle Name: Edward
Date of Birth: 11/14/1963
Address: 555 Anytown Road
City: Anytown
State, Zip: VA, 55555
SSN:

Interviewer: Gloria Jones
Agency: ABC CSB
Address: 789 Anytown Road
City: Anytown

Essential supports for this individual are being provided by:

Name:
 ABC Residential
 ABC Day Support
 John Turner
 Marshall Morgan

Information for the SIS ratings was provided by:

Name:
 Stephanie Klein
 Marshall Morgan
 John Turner

Name of Person who entered this information:
Other Pertinent Information:

Home	
What's working? <i>Things I would like to stay the same</i>	What's not working? <i>Things I would like to see changed</i>
Home <i>Living in the same place as Joe and Jerry.</i>	<i>Living with too many people (8 in the home) and a roommate who doesn't like him to play his music after 9 p.m. If he wakes in the night, he wanders around, because he "can't sleep" and is "grumpy the next day."</i>
Routines <i>Breakfast and dinner with Joe and Jerry.</i>	<i>Having his morning routine not go as he likes. Not being able to do things when he wants to do them. Helping Jack with what he can do himself. Not giving him privacy. Putting on shirts that have tags that scratch his neck. Not getting to sit on the porch with his coffee.</i>
Independence <i>Making his own decisions about when to stay home and when to go to the day program. Helping John Turner (the contracted lawn service) in the yard.</i>	<i>Not being able to work in the yard or go places in the community when he'd like to.</i>
Privacy <i>Jack likes using John T's tool shed as a retreat when he wants to be alone.</i>	<i>No place set aside in the house for Jack to be alone when he needs it.</i>
Safety at home <i>Joe and Jerry let other people know when Jack isn't feeling well. If he seems confused or doesn't answer, they help him sit or lie down and sip some orange juice.</i>	<i>Walking long distances alone along the wrong side of the busy highway to get to Krispy Kremz to visit his "buddies."</i>
Community and Interests	
What's working? <i>Things I would like to stay the same</i>	What's not working? <i>Things I would like to see changed</i>
Neighborhood <i>Living close (less than a mile) to shops and restaurants that Jack likes to visit.</i>	<i>Has to be driven across the highway to the shops and restaurants he likes to visit, so doesn't happen often and doesn't have a "neighborhood."</i>

Notice what's important TO Jack this year.

Part III. Shared Planning

Outcome #	What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	
1	<i>Privacy and time alone.</i>			
2	<i>Following his own routine every morning.</i>			
3	<i>Gardening.</i>			
4	<i>Being out and about in his community.</i>			
5	<i>Being strong.</i>			
6	<i>Foods he likes.</i>			
7	<i>Being with friends at the Coffee Counter.</i>			

Notice what's important FOR Jack this year.

<u>Outcome #</u>	What is IMPORTANT FOR ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who sup
12	<i>Staying safe around highways</i>			
13	<i>Support for diabetes</i>			
14	<i>Staying healthy</i>			
15	<i>Clean clothes and home</i>			
16	<i>Meeting financial responsibilities</i>			
17	<i>Being understood by others</i>			
18	<i>Receiving supports as agreed to in his plan</i>			

Next, the team develops each important TO and each important FOR item into a measurable outcome statement that describes “what success looks like” and records it on Shared Planning.

Part III. Shared Planning



What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?

What are Outcomes?

Outcomes are **NOT** services

“Jack receives residential services.”

Outcomes are **NOT** meaningless to the individual.

“Jack ties his shoes.”

Outcomes are **NOT** the same for everyone.

“Jack gets along with others.”

What are Outcomes?

Outcomes **ARE** written as if they are happening now.

“Jack has a paid job he likes.”

Outcomes **ARE** the individual’s choices.

“Jack lives in his own apartment with the privacy he wants.”

Outcomes **ARE** identified by considering the individual’s profile.

“Jack helps plant and tend a vegetable garden.”

What are Outcomes?

Outcomes **ARE** seen and counted.

“Jack does routine activities with friends each week, such as going to ballgames or having them over for dinner.”

Outcomes **ARE** written in the individual's words,

“I ride a horse.”

or from the team's perspective.

“Jack rides a horse.”

Outcomes must be measurable and result in actions you can see or learning you can assess.



Using verbs helps clarify what we are measuring.

travels

makes

paints

sings

moves

collects

cooks

watches

creates



visits

Example Desired Outcomes

Jack walks to the corner store each week to buy something he likes.

Margo listens to the country band every Friday night.

Craig helps with the landscaping by pulling weeds and mowing the grass each week.

Martin cares for his dog by giving him baths each week.

Which are Outcomes?

Jack had popcorn at the movies.

Jack orders popcorn at the movies.

Jack prefers popcorn over candy when he goes to the movies.

Which are Outcomes?

Jack had popcorn at the movies.

Jack orders popcorn at the movies.



Jack prefers popcorn over candy when he goes to the movies.

Which are Outcomes?

Gloria has stable blood sugar and is free from diabetic symptoms.

Gloria needs insulin for her diabetic condition.

Gloria takes her insulin daily.

Which are Outcomes?

Gloria has stable blood sugar and is free from diabetic symptoms.



Gloria needs insulin for her diabetic condition.

Gloria takes her insulin daily.



Which are Outcomes?

Max has not had a seizure in over 3 months because he takes medication daily.

Max experiences fewer seizures each month.

Max's seizures make him tired when they happen.

Which are Outcomes?

Max has not had a seizure in over 3 months because he takes medication daily.

Max experiences fewer seizures each month.



Max's seizures make him tired when they happen.

Part III. Shared Planning

Outcome #	What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?
1	<i>Privacy and time alone.</i>	<i>Jack has time away from the others at home and at the day program to do something he enjoys on his own.</i>		
2	<i>Following his own routine every morning.</i> 	<i>Jack has a calm and relaxed morning routine, with time after breakfast for sitting on the porch or something else he enjoys.</i>		
3	<i>Gardening.</i>	<i>Jack helps plant and tend a vegetable garden.</i>		
4	<i>Being out and about in his community.</i>	<i>Jack uses local businesses and attends neighborhood events.</i>		
5	<i>Being strong.</i>	<i>Jack lifts weights regularly.</i>		
6	<i>Foods he likes.</i>	<i>Jack selects his menu and</i>		

What's important TO Jack this year becomes a desired outcome.

Outcome #	What is IMPORTANT FOR ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?
12	<i>Staying safe around highways</i>	<i>Jack remains safe around traffic.</i>		
13	<i>Support for diabetes</i>	<i>Jack's blood sugar remains stable.</i>		
14	<i>Staying healthy</i> 	<i>Jack is clean each day, maintains his current weight and has good medical and dental check-ups.</i>		
15	<i>Clean clothes and home</i>	<i>Jack has clean clothes and lives in a tidy, organized home.</i>		
16	<i>Meeting financial responsibilities</i>	<i>Jack budgets and pays his bills.</i>		
17	<i>Being understood by others</i>	<i>Jack communicates his preferences and choices.</i>		
18	<i>Receiving supports as agreed to in his plan</i>	<i>Jack's desired outcomes are achieved.</i>		

What's important FOR Jack this year becomes a desired outcome.

Important TOs and FORs are global and become more specific and measurable when outcomes are defined.



Important TO = gardening

Desired outcome = Jack plants and tends a vegetable garden.



Important FOR = personal care

Desired outcome = Devon is clean and has a neat general appearance.

The team then adds “How often” or “By When” to identify how often the outcome is expected to occur.

Part III. Shared Planning

What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's suppo

The “by when”
date is the
annual ISP date
unless indicated
sooner.

Part III. Shared Planning

Outcome #	What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?
1	<i>Privacy and time alone.</i>	<i>Jack has time away from the others at home and at the day program to do something he enjoys on his own.</i>	<i>Daily</i>	
2	<i>Following his own routine every morning.</i>	<i>Jack has a calm and relaxed morning routine, with time after breakfast for sitting on the porch or something else he enjoys.</i>	<i>Daily</i>	
3	<i>Gardening.</i>	<i>Jack helps plant and tend a vegetable garden.</i>	<i>Weekly</i>	
4	<i>Being out and about in his community.</i>	<i>Jack uses local businesses and attends neighborhood events.</i>	<i>Weekly</i>	
5	<i>Being strong.</i>	<i>Jack lifts weights regularly.</i>	<i>3 times Weekly</i>	
6				

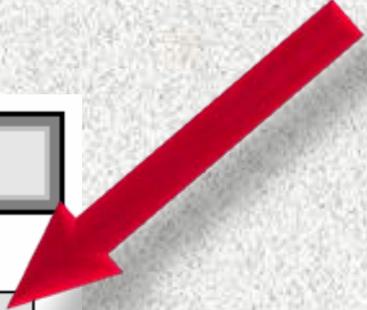


Jack's morning routine is expected to occur daily as recorded above.

Finally, all providers that will be assisting the individual with the outcome are listed in the last column “Who’s going to support me?”

Part III. Shared Planning

What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?



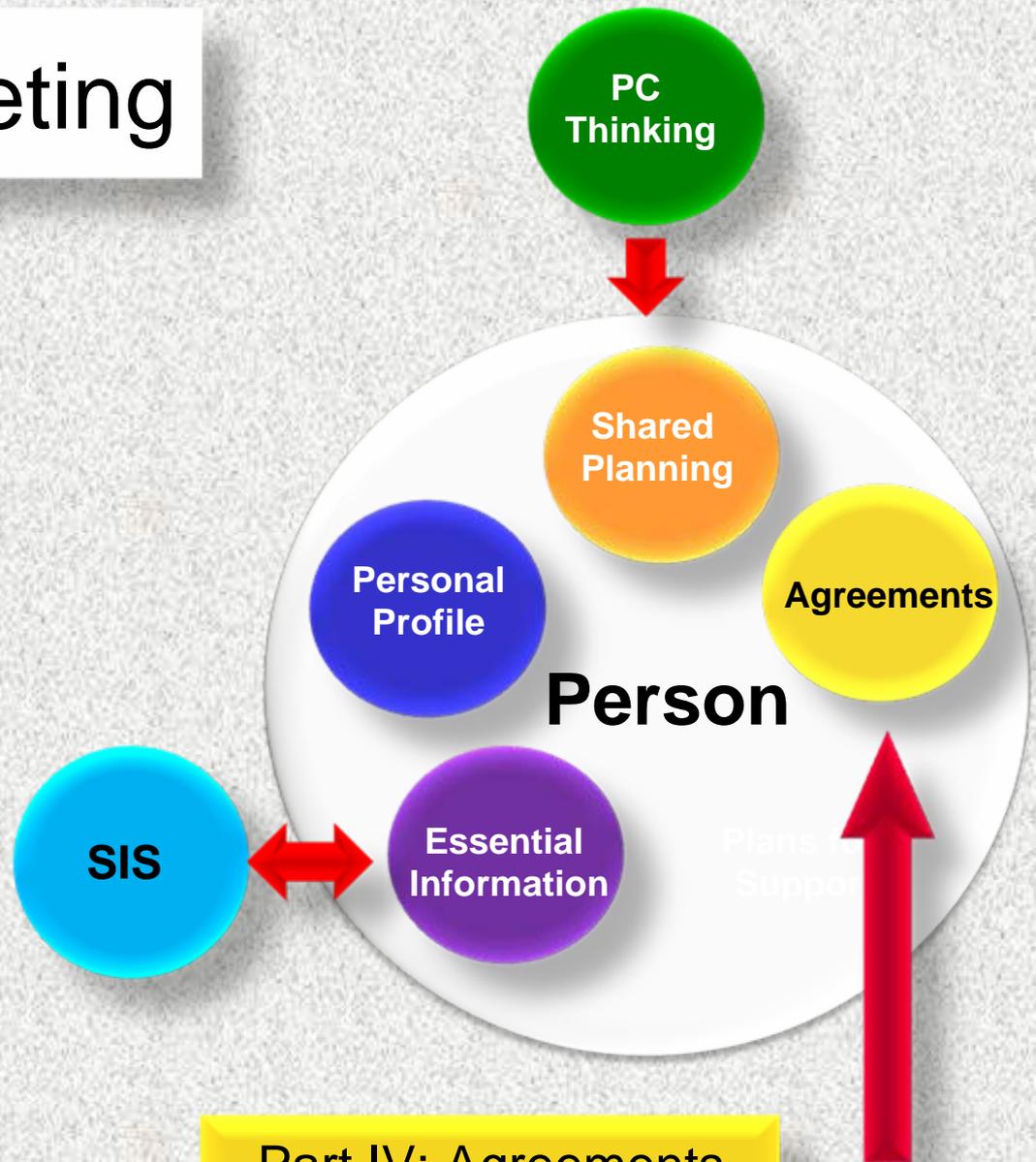
Part III. Shared Planning

Outcome #	What is IMPORTANT TO ME this year?	What does success look like? DESIRED OUTCOMES	How often or by when?	Who's going to support me?
1	<i>Privacy and time alone.</i>	<i>Jack has time away from the others at home and at the day program to do something he enjoys on his own.</i>	<i>Daily</i>	<i>Residential: River Creek, LLC. Day Support: New Adventures</i>
2	<i>Following his own routine every morning.</i>	<i>Jack has a calm and relaxed morning routine, with time after breakfast for sitting on the porch or something else he enjoys.</i>	<i>Daily</i>	<i>Residential: River Creek, LLC.</i>
3	<i>Gardening.</i>	<i>Jack helps plant and <u>tend</u> a vegetable garden.</i>	<i>Weekly</i>	<i>Residential: River Creek, LLC. Day Support: New Adventures Support Coordinator: Oakridge CSB</i>
4	<i>Being out and about in his community.</i>	<i>Jack uses local businesses and attends neighborhood events.</i>	<i>Weekly</i>	<i>Residential: River Creek, LLC. Day Support: New Adventures</i>

Name the providers that are supporting Jack with Outcome # 2.

ventures

During the Meeting



Part IV: Agreements

Part IV: Agreements

Part IV. Agreements

Individual - Does my plan match...?

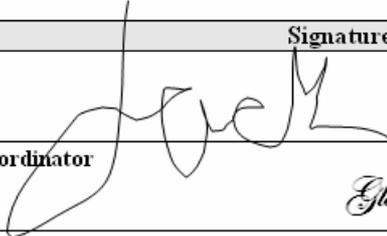
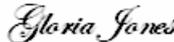
what makes me happy/
my dreams?
being with people that
like?
where & how I want to
things I like to do?
how I want to travel?
how I want to handle my
money?

**If the answer is "no"
again. Please describe
meeting and any plan**

Team

Are there any unfinished
tasks from my plan that
not yet completed?

Are there any outcomes
are in conflict with what
most important to me?

Signatures of partners who agree to help me with my plan:		
Individual		Date 02/10/09
Support Coordinator		Date 02/10/09
Guardian/ Authorized Representative		Date
Partner Stephanie Klein	Relationship/service/support DSF	Date 02/10/09
Partner Marshall Morgan	Relationship/service/support DSF	Date 02/10/09
Partner Melissa Schaffer	Relationship/service/support DSF	Date 02/10/09
Partner	Relationship/service/support	Date
Partner	Relationship/service/support	Date
Partner	Relationship/service/support	Date

Part IV. Agreements

Individual - Does my plan match...?



what makes me happy?	<input type="checkbox"/> Yes <input type="checkbox"/> No	what I need to be safe?	<input type="checkbox"/> Yes <input type="checkbox"/>
my dreams?	<input type="checkbox"/> Yes <input type="checkbox"/> No	how I contribute?	<input type="checkbox"/> Yes <input type="checkbox"/>
being with people that I like?	<input type="checkbox"/> Yes <input type="checkbox"/> No	new things I want to learn?	<input type="checkbox"/> Yes <input type="checkbox"/>
where & how I want to live?	<input type="checkbox"/> Yes <input type="checkbox"/> No	my work dreams?	<input type="checkbox"/> Yes <input type="checkbox"/>
things I like to do?	<input type="checkbox"/> Yes <input type="checkbox"/> No	the support that I need?	<input type="checkbox"/> Yes <input type="checkbox"/>
how I want to travel?	<input type="checkbox"/> Yes <input type="checkbox"/> No	people who support me?	<input type="checkbox"/> Yes <input type="checkbox"/>
how I want to handle my money?	<input type="checkbox"/> Yes <input type="checkbox"/> No	how I describe a good life?	<input type="checkbox"/> Yes <input type="checkbox"/>

If the answer is “no” to any of these questions, go back to that part of the profile and consider again. Please describe the reason for any questions above remaining “no” at the end of the meeting and any plan to resolve.

Team



Are there any unfinished tasks from my plan that are not yet completed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Does any team member have an objection to any outcomes in my plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are there any outcomes that are in conflict with what's most important to me?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do I need financial planning or benefits counseling in order to maintain or maximize resources?	<input type="checkbox"/> Yes <input type="checkbox"/> No
		Are there any IMPORTANT	

The individual questions and the team questions help to evaluate the planning process.

All partners work together to answer the agreement questions.



Any disagreements are revisited in discussion for resolution and unresolved items are documented on the agreement page.

Part IV. Agreements

Individual - Does my plan match...?

what makes me happy?	<input type="checkbox"/> Yes <input type="checkbox"/> No	what I need to be safe?	<input type="checkbox"/> Yes <input type="checkbox"/> No
my dreams?	<input type="checkbox"/> Yes <input type="checkbox"/> No	how I contribute?	<input type="checkbox"/> Yes <input type="checkbox"/> No
being with people that I like?	<input type="checkbox"/> Yes <input type="checkbox"/> No	new things I want to learn?	<input type="checkbox"/> Yes <input type="checkbox"/> No
where & how I want to live?	<input type="checkbox"/> Yes <input type="checkbox"/> No	my work dreams?	<input type="checkbox"/> Yes <input type="checkbox"/> No
things I like to do?	<input type="checkbox"/> Yes <input type="checkbox"/> No	the support that I need?	<input type="checkbox"/> Yes <input type="checkbox"/> No
how I want to travel?	<input type="checkbox"/> Yes <input type="checkbox"/> No	people who support me?	<input type="checkbox"/> Yes <input type="checkbox"/> No
how I want to handle my money?	<input type="checkbox"/> Yes <input type="checkbox"/> No	how I describe a good life?	<input type="checkbox"/> Yes <input type="checkbox"/> No

If the answer is "no" to any of these questions, go back to that part of the profile and consider again. Please describe the reason for any questions above remaining "no" at the end of the meeting and any plan to resolve.

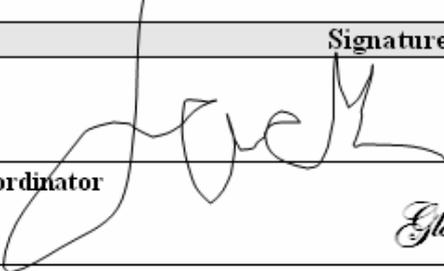


Team

Are there any unfinished tasks from my plan that are not yet completed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Does any team member have an objection to any outcomes in my plan?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are there any outcomes that are in conflict with what's most important to me?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Do I need financial planning or benefits counseling in order to maintain or maximize resources?	<input type="checkbox"/> Yes <input type="checkbox"/> No
		Are there any IMPORTANT	

Unresolved items and disagreements are recorded in the spaces provided.

All partners sign in agreement and other absent, unpaid contributors are listed.

Signatures of partners who agree to help me with my plan:		
Individual		Date 02/10/09
Support Coordinator	<i>Gloria Jones</i>	Date 02/10/09
Guardian/ Authorized Representative		Date
Partner Stephanie Klein	Relationship/service/support DSP	Date 02/10/09
Partner Marshall Morgan	Relationship/service/support DSP	Date 02/10/09
Partner <i>Melissa Schaffer</i>	Relationship/service/support DSP	
Partner	Relationship/service/support	
Partner	Relationship/service/support	Date
		43
	Relationship/service/support	Date

Sent by SC to all partners

After the annual meeting, copies of Part I updates and parts II, III, and IV are shared by the support coordinator with all partners.



This concludes Module 3 – During the Annual Meeting

