The overall impression...

Does the plan...

• show that the person was involved and contributed? (ie: includes quotes from the person and “I” statements if the person uses verbal language, includes descriptions of gestures etc. if the person uses body language to communicate, includes responses from communications systems if the person uses technology to communicate)
  ☐ Yes  ☐ No  Comments...

• show that family and friends were involved and contributed?
  ☐ Yes  ☐ No  Comments...

• show separately what is important to the person from what is important to all of the other people in the person’s life? (ie: it is clear which statements are from the person and which are from others)
  ☐ Yes  ☐ No  Comments...

• respect the person’s privacy while making certain that those who need to know have the needed information? Does the plan clearly say who cannot have access to information in the plan? (ie: private information is kept in a brown envelope with a note on front about who has access)
  ☐ Yes  ☐ No  Comments...

• read positively about the person?
  ☐ Yes  ☐ No  Comments...

• use respectful language?
  ☐ Yes  ☐ No  Comments...
Does the plan...

• avoid jargon and ‘human service lingo’?
  □ Yes □ No Comments...

• use plain language that the person and/or family and friends, and those implementing the plan understand?
  □ Yes □ No Comments...

• make it easy and inviting to read?
  □ Yes □ No Comments...

• reflect the culture of the person?
  □ Yes □ No Comments...

• give enough detail to understand what is meant?
  □ Yes □ No Comments...

• make you feel like you have met the person even if you have not?
  □ Yes □ No Comments...

• tell you what the person said when the plan was written up and then reviewed with them to make sure it’s right?
  □ Yes □ No Comments...
What’s covered in the plan

Does the plan...

• review the person’s current situation?
  □ Yes □ No Comments...

• review what has happened since the previous plan?
  □ Yes □ No Comments...

• clearly outline the person’s goals?
  □ Yes □ No Comments...

• identify any barriers to reaching the goals?
  □ Yes □ No Comments...

• identify options to explore or a way to develop options to reach goals?
  □ Yes □ No Comments...
The person’s voice...

Does the plan...
• describe what the person wants in terms of their relationship with family?
  □ Yes    □ No       Comments...

• describe what the person wants in terms of keeping their friends and making new friends?
  □ Yes    □ No       Comments...

• describe what the person wants in terms of where they live and who they live with
  □ Yes    □ No       Comments...

• describe what the person likes to do and things they’d like to try in their community:
  · job
  · spirituality
  · fun
  · vacations
  · sexuality
  · education
  · learning new things
  · new experiences
  · material things
  · volunteer work
  ·
Does the plan...

- describe what is important to the person in terms of their routines
  - Yes  □  No  □  Comments...

- describe what is important to the person about the decisions they make and would like to make about both the big and little things in life
  - Yes  □  No  □  Comments...

- describe what the person likes and dislikes
  - Yes  □  No  □  Comments...

- describe the person’s dreams
  - Yes  □  No  □  Comments...

- describe how the person communicates
  - Yes  □  No  □  Comments...

- describe what is important to the person about their health
  - Yes  □  No  □  Comments...

- describe what is important to the person about their safety
  - Yes  □  No  □  Comments...
What other people say...

Does the plan...

• describe what others want for the person in terms of their relationship with their family?
  □ Yes □ No Comments...

• describe what others want for the person in terms of keeping friends and making new ones?
  □ Yes □ No Comments...

• describe what others want for the person in terms of where they live and who they live with
  □ Yes □ No Comments...

• describe what others feel the person likes to do and things they’d like to see them try in their community:
  · job
  · volunteer work
  · spirituality
  · fun
  · vacations
  · education
  · learning new things
  · new experiences
  · material things
Does the plan...

- describe what is important to others in terms of the person’s routines
  - Yes
  - No
  Comments...

- describe what is important to others about the decisions the person makes and feel they would like to make about both the big and little things in life
  - Yes
  - No
  Comments...

- describe what others feel the person likes and dislikes
  - Yes
  - No
  Comments...

- describe what others dream for the person
  - Yes
  - No
  Comments...

- describe what is important to others about how the person communicates
  - Yes
  - No
  Comments...

- describe what is important to the others about the person’s health
  - Yes
  - No
  Comments...

- describe what is important to the others about the person’s safety
  - Yes
  - No
  Comments...
How service is provided

Does the plan...

• include options and opportunities for support other than paid services?
  ☐ Yes  ☐ No  Comments...

• include options the person has in choosing a service provider?
  ☐ Yes  ☐ No  Comments...

• clearly outline how goals will be achieved? (ie: who’s going to do what by when)
  ☐ Yes  ☐ No  Comments...

• outline what the person said they want staff to do?
  ☐ Yes  ☐ No  Comments...

• say what qualities the person wants in support workers who will be providing the service?
  (ie: “someone who likes to get out and do things”, “not bossy or loud”, “quiet and won’t push me to do things I don’t want to do”, etc.)
  ☐ Yes  ☐ No  Comments...
Does the plan...

• outline anything else services need to know in order to support the person successfully?
  ☐ Yes ☐ No Comments...

• cover any history that is relevant to providing current supports?
  ☐ Yes ☐ No Comments...

• outline any issues to be resolved or questions to be answered?
  ☐ Yes ☐ No Comments...
Reviewing the plan...

The following questions are designed to help ensure that the plan created by people, their family, friends and service providers is written in a way that clearly says what people want and how services will respond. It is intended as a self-evaluation tool to be used by planning facilitators to consider the way they write plans.

There are five sections:
- The overall impression
- What’s covered in the plan
- The person’s voice
- What others say
- How services will be provided

It is recommended that if the box is checked off in any question, comments be added to explain why that element is missing (ie: it may not be relevant, it may have been forgotten or missed in the planning process etc.)