

Person-Driven Checklist

Can be completed in any order by anyone (actor, supporter or observer) to consider how “person-driven” a specific planning and change process is.

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Name (person completing the checklist)

Date

The specific planning process I want to consider _____

(Name the topic, purpose, and/or time frame for the plan; for example “Residential Plan March 2009”)

The person or family who is expecting (or expected) to make a change:

What role(s) I have in planning - √ all that apply

- | | | |
|---|---|--|
| <input type="checkbox"/> Actor/Changer | <input type="checkbox"/> Employer | <input type="checkbox"/> Spiritual Support |
| <input type="checkbox"/> Facilitator | <input type="checkbox"/> Supervisor/Administrator | <input type="checkbox"/> Witness/Observer |
| <input type="checkbox"/> Family | <input type="checkbox"/> State Agency Worker | <input type="checkbox"/> Teacher/Coach |
| <input type="checkbox"/> Advocate or Friend | <input type="checkbox"/> Employee | <input type="checkbox"/> Other Supporter |
| <input type="checkbox"/> Peer Worker | | |
| <input type="checkbox"/> Service Provider (not peer-designated) | | |

Planning Power

1. First, answer the 14 questions below quickly and honestly in “1st Response” column.

2. Then, rate your answer in terms of person-driven in the “Rating” column.

* = strongly person-driven ! = not yet person-driven ? = hard to decide

3. Lastly, discuss what you found with other people in the planning group.

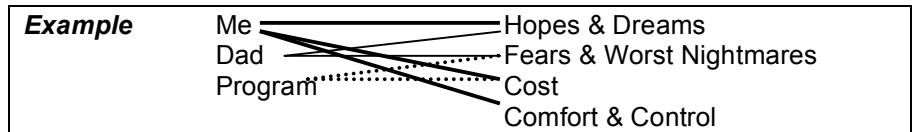
<u>Questions to Consider</u>	<u>1st Response</u> One-word answers encouraged!	<u>Rating</u> Strongly Person-driven = * Not yet Person-driven = ! Hard to decide = ?	<u>Discussion</u>
	<u>Plus</u> “food for thought” follow-up questions		
1. Do you know who else (from “role list” p. 1) is involved with planning?			
2. Do you schedule planning meetings? <i>If “no”, who does?</i>			
3. Do you write down or keep a record of plans, decisions or activities around change? <i>Does anyone else?</i>			
4. If someone else keeps a record (Answer #3), do you get to see it? <i>Who does get to see the record?</i>			
5. Where do conversations about action plans take place?			
6. How long has this change been discussed?			
7. Are actions for change already being made? <i>Are they appreciated?</i>			

8. <i>Is action or change expected within the next 3-6 weeks?</i>		
9. <i>Do you have the power to make, plan or prevent the change?</i> <i>Who has the most power?</i>		
10. <i>Do you have accurate and current information about the resources involved (ie: money, stuff, time)</i> <i>Who does/should?</i>		
11. <i>Do you have accurate and current information about the people and relationships involved?</i> <i>Who does/should?</i>		
12. <i>Do you have accurate and current information about the treatment or rehabilitation involved?</i> <i>Who does/should?</i>		
13. <i>Are you doing a self-assessment?</i> <i>Who does/should?</i>		
14. <i>Are you assessing someone or something else?</i> <i>Who does/should?</i>		

Notes:

What Drives Us

Draw lines connecting significant Persons/Groups to their top 2-3 Concerns. Notice that multiple Persons/Groups might share the same Concerns.



Persons/Groups

Concerns

Individual	Human Rights & Values
Supporter	Hopes & Dreams
Family	Fears & Worst Nightmares
Culture (peer, professional, ethnic...)	Concrete Goals
Provider (individual or team)	Cost
Program	Understanding/Being Understood
State System/Agency	Comfort & Control
Insurance or Funder	Professional Ethics
	Self-Preservation & Security

My Attitudes

Think about the beliefs & attitudes you hold about the fundamental (sometimes emotional) topics below.

* topic if your views can accommodate a range of possible plans for action, for yourself or others.

✓ topic if you have a strong sense that one approach is correct; circumstances where it would be difficult to consider new ideas or where you might interfere with someone else's decision.

- | | |
|--|---|
| <input type="checkbox"/> Recovery
<input type="checkbox"/> Diagnosis
<input type="checkbox"/> Cultural practices
<input type="checkbox"/> Trauma
<input type="checkbox"/> Money
<input type="checkbox"/> Drug use
<input type="checkbox"/> Spirituality | <input type="checkbox"/> Valued Roles (past, present, future)
<input type="checkbox"/> Housing
<input type="checkbox"/> Child care
<input type="checkbox"/> Medical care
<input type="checkbox"/> Health choices
<input type="checkbox"/> Relationships
<input type="checkbox"/> End of life |
|--|---|

Person-centered Planning & Resources

The four tasks, operational definitions and resources below were compiled by The Transformation Center and uses Shery Mead's work on Intentional Peer Support www.mentalhealthpeers.com and the National Coalition of Mental Health Consumer/Survivor Organization's www.ncmhcsso.org draft workbook "eCPR" (emotional CPR).

Person-centered planning requires practicing basic skills, as both planner and supporter. The following tasks counter and balance our human tendencies toward CONTROLLING other people and the environment and PROTECTING the future based on a LIMITED understanding of the past and present. They work against the desire we all have (driven by anxiety, arrogance, doubt...) to SEPARATE ourselves, particularly in times of stress. Such tendencies can be valuable, but if unchecked, they stifle growth, learning and change. **Consider which tasks are easiest, hardest or most energizing for you...**

* **Connection and Moving Toward**

*Minimize distractions and focus attention. Be curious, engage by listening, reflecting meaning and feeling, and asking open-ended questions. Convey confidence in the person and support an empathetic partnership in which the person taking action retains full choice and control. **Outcome:** The actor feels listened to, validated and in partnership in such a way that he/she experiences as sense of safety, support, and room to voice distress.*

* **Mutuality and Transparency**

*The "problem / crisis" and the roles of "helper" and "victim" are re-contextualized, described and understood as human experiences rather than elements of sickness. Differences in power and access to resources are identified and shared concerns are named. **Outcome:** Actors and supporters can both learn and benefit from as partners with a shared concern.*

* **Empowerment**

*Affirm and support the person's capacity for effective action following a time of crisis. Appreciation is expressed for participation at any level, while whole-hearted participation is encouraged. The person connects to her/his inner power and passion. **Outcome:** The actor fuels planning. The person makes and acts on his/her own choices, and resumes or establishes valued roles in the community.*

* **Revitalization**

*Foster connections with the relationships, roles and routines that have been meaningful for the person in the past, energize the present and are congruent with a meaningful future. Clarify expectations about the nature and time frame of the planning partnership. **Outcome:** Through reconnection, the person's passions and 'spirit' take charge and s/he transitions to community roles.*

Each task occurs in the context of checks and balances that are part of community life. These structures can change over time and/or with great effort and may reduce the freedom of expression or sharing of resources by both planners and supporters. Systems, however, do not have to limit one's spirit to understand and to help one's self or another person remember the whole person that s/he truly is.

- * **Mark Ragins** at The Village, CA, including "Knowing a Recovery Culture When You See One" and "Medication Collaboration Strategies" www.mhavillage.org
- * **Institute for Community Inclusion** "Achieving Quality Services: A Checklist for Evaluating your Agency", ICI Institute Brief Oct 2002 www.communityinclusion.org
- * **"In the Driver's Seat: A Guide to Self-Directed Mental Health Care"** 2008 www.bazelon.org or www.upennrrtc.org
- * **The Right Question Project** "tapping the potential of people...to become *more self-sufficient in their own lives * active citizens participating on all levels of our democratic society." www.rightquestion.org
- * **The Center for Self-Determination** "devoted to moving power and authority over resources directly to individuals with disabilities, families and allies." www.centerforself-determination.com