

Planning Together for Families & Friends

***Suggestions for Non-Paid People to Share Their Voice, Ideas and
Connections
To Help People Plan For A Great Life***

***by
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**This document has been edited from the full version of
Planning Together
*A Guide For Facilitators, Self-Advocates, Their Families, Friends & Paid Supports
To Help People Plan For A Great Life***

Realizations Training & Resources

People Involved in Planning

“Personal planning moves the people involved to an interdependent relationship, creating a small community that acts as a bridge to the full community.”

John Jones

The success of planning depends on the inclusion of the person and everyone who is close to them and involved in helping them to move forward in their life.

Family and Friends

You know so many important things about the person who is planning. Family members have been involved with their son, daughter, brother or sister for all or most of the person's life and have the most familiarity with how they grew up and what kind of a person they are becoming. Friends bring caring along with a certain objectivity that is sometimes hard for both family members and support workers, who often feel more responsibility for care-giving types of support than friends usually have.

Family and friends are constants in the person's life and care about them very much. All planning should take place in ways that invite and respect the opinions of non-paid people and support their relationships with the person who is planning.

What You Bring to the Planning Process

- Your knowledge of the person, often since they were born
- Your caring and love for the person
- Your ideas about what might bring delight, satisfaction and meaning to the person's life
- Your connections in the community
- Your skills, interests and life experience

What You Can Receive from the Planning Process

- Opportunities to share your ideas about what the person may enjoy in their life
- The chance to offer practical assistance in carrying out some of the person's wishes
- Opportunities to expand your relationships with the person who is planning and others who care about them
- Learning more about how paid supports are working in the person's life
- Being able to express your thoughts and ideas to support workers as well as to the person
- Chances to learn about planning and being part of a group

What People Can Expect From Planning Meetings

Family and Friends

You can expect to have any questions about planning answered ahead of time, and for a facilitator to meet with you if you wish, to explain the process further.

You may be asked to get together with the person and the facilitator before the meeting takes place, to help them think about what is important to them and what they want for their future.

You can expect to be listened to and treated with respect by others in the group.

You will be invited to add to the information about the person's past and present experiences, preferences and relationships, and to identify their talents, gifts and positive qualities. These topics are discussed in a positive, respectful way that is sensitive to any areas that the person wants kept private.

You will also be asked to add to the person's ideas about what might comprise a happy future for them. Family and friends should expect that their suggestions will be considered by the person but may not be used.

You can expect to be invited to think of everyday community resources and your connections as possible ways to help someone realize their dreams, and to consider your own talents, gifts, and knowledge as possible ways to help the person come closer to the future they want.

Facilitation

“We cannot do everything and there is a sense of liberation in that. This enables us to do something and to do it very well.”

Archbishop Oscar Romero

Facilitation means, ***“to assist, to make easy.”*** A good facilitator helps others to express ideas and work together as a group to reach agreement and achieve goals together. Facilitation requires a real understanding of people and the ability to honour everyone's strengths and needs and to balance process and outcomes.

Certain skills and understanding must be present in order to facilitate well, and when that happens, it truly is an art! You don't have to be a paid person to be a wonderful facilitator but you do need to have the necessary qualities and information to do this. Some of these essential traits include:

- Being a “people person”...warm, caring, respectful, and genuinely interested in others
- Believing in the Values of personal planning with all your heart
- Attentive listening, where you honestly want to know what someone means by what they say
- Comfortable with yourself so you can share power and encourage others
- Being creative and enthusiastic
- Good organizational skills to prepare and keep everyone on course
- Seeing the gifts and positive qualities in others and finding ways to help them use and celebrate these talents
- The ability to judge how a conversation or group process is going, how the energy is flowing
- Well connected to others in the community and able to use those connections in creative, sensible ways
- In possession of a good sense of humour, a sense of proportion, and common sense, which may all be the same thing
- Being able to see what is most important at the moment and cultivating that in ways that allow everyone to thrive

Some Images of a Good Facilitator

Host/ess

- Issues thoughtful invitations
- Creates a welcoming, enjoyable atmosphere
- Provides refreshments
- Helps others to feel comfortable and to connect
- Keeps activities moving in ways that are enjoyable to everyone

Detective



- Has an overall outcome in mind
- Looks for clues
- Stays open to new developments
- Asks intelligent questions
- Has good problem-solving skills
- Relies on intuition as well as facts

Orchestra Conductor

- Brings together many disparate talents to create a beautiful result
- Knows how to help everyone work together
- Has a great sense of timing and rhythm



Interpreter

- Able to keep track of different conversations at the same time
- Offers people's thoughts back in their own words

Responsibilities of Facilitators

Honouring the Values and Process of Planning

- To believe in and model the qualities and values that are the foundation of personal planning
- To listen carefully to the person who is planning and to everyone else in the group
- To create a safe and welcoming space where people feel comfortable to contribute
- To be aware of who is shy about speaking and who may be monopolizing the group's time, and to use respectful and tactful ways to bring more balance to the discussions

- To have some timelines established for different parts of the process and some flexibility regarding when these can be changed
- To help people in the group get to know and trust each other
- To help resolve disagreements within the group in respectful ways
- To keep learning about new ideas in facilitation, planning, and support
- To foster leadership and creativity in the group regarding ways to help the person achieve their dreams
- To help everyone in the group think of all the regular community resources and connections that can be accessed to make dreams come true

Staying On Task To Accomplish Goals

- To share initial information about planning with the person, their family, and others who will be supporting them throughout the process
- To facilitate discussion and decisions with the person, their family and others involved, regarding how and where the planning will take place and who the person wants to invite
- To help in arranging details of the meeting, such as confirming a location, issuing invitations, arranging transportation, setting the agenda, etc.
- To provide additional information, if desired, to people invited to the planning meeting, through written material, telephone conversations, or in person
- To gather the necessary tools and materials for the planning meetings, including a flip chart, broad tipped, water-based markers, low tack tape, and any handouts you may wish to share
- To welcome the group at the beginning of the meeting, facilitate introductions, and explain the purposes of the gathering

- To help everyone understand the Values and the process of personal planning
- To help the group develop some ground rules for working together
- To ask questions and gather information about the person's Past, Present, and Dreams for the Future
- To sum up the main points from time to time and check back with people to see if you have perceived their comments accurately
- To record information on the flip chart through creating Maps of the Past, Present, and Future, using simple drawings as well as words
- To know when to suggest that people take a break
- To facilitate brainstorming and problem solving regarding how the person's dreams will become reality
- To help the group develop an Action Plan, with timelines and people responsible
- To continue to assist the person to develop the connections they need to create the life they want and keep growing in their vision of a good life.
- To write up the Planning Notes, including the reproduction of the three Maps, within two weeks of the meeting, and send these to people who are in the planning group
- To facilitate additional meetings, building in simple ways to evaluate what has happened since the last gathering
- To encourage the person and others helping them plan to attend trainings and learn from written and taped resources about personal planning, community building, and innovative support

Checklist for Self-Advocates and Members of a Planning Group About Facilitators

- Do I feel respected and liked by the facilitator?
- Do I feel listened to and heard?
- Are they pleasant to be around?
- Do they give me all the information I need and want about planning?
- Do they take time to ask me if I understand what they are saying and what I think about it?
- Do they ever ask if they are going too fast?
- Do they take my schedule into consideration when getting together with me?
- Do they ask me if I need a ride?
- Do they ask if I want someone else to come to a meeting with me?
- Do they also share their own ideas, without making me feel I have to agree?
- Do they make the meetings fun and also make sure we get things done?
- Do they do what they say they are going to do, within the time limit we have agreed on?
- Do they stay connected to me and help me develop connections to community?

Relationship Questions for the Facilitator, The Person Who Is Planning, and their Network

- ❑ How long has the facilitator known the person and their family?
- ❑ What does s/he know or need to know about how the person communicates?
- ❑ Is a trust relationship established yet? What will help that to grow?
- ❑ What are the facilitator's assumptions/expectations about the person's hopes, dreams, capacities, needs?
- ❑ What are their assumptions/expectations about the family relationships and involvement? What do they need to know?
- ❑ What hopes and fears do the person's family have?

Summary of Planning Steps

Please Note: These Steps are based on planning that is a version of Personal Futures Planning described in Planning Together. Some of the Steps here are the same as MAPS, PATH, Essential Lifestyle Planning and other ways of doing this, even if they have different names. Other Steps here are different, but ALL of the ways of planning have the same Values and ALL of them help the person share positive information about themselves and look at what they want in life and how to get it, with some help.

- **Raising the Idea of Planning**
- **Sharing Information About Personal Planning**
- **Planning the Planning Meeting**
- **Extending Invitations with Background Information**
- **Physical Setup and Equipment**
- **Offering Hospitality**
- **Welcome and Introductions**
- **Explaining the Planning Process**
- **Establishing Ground Rules**
- **Learning from the Person's Past**
- **Learning About the Person's Life Now**
- **Key Quality Questions**
- **Learning About the Person's Vision for Their Future**
- **Fleshing Out Dreams and Making Dream Statements**
- **Brainstorming to Make Dreams Reality**
- **Determining Supports Needed to Achieve Dreams**
- **Identifying Obstacles and Solutions**
- **Creating an Action Plan**

The Planning Process Step by Step

Planning Step: Raising the Idea of Planning

The idea to do personal planning can come from anyone who is part of the process.

Family and Friends

As more families learn about the benefits of personal planning, they are requesting that this process be the driving force in developing the best supports for their sons and daughters, and brothers and sisters. Family members who are part of networking and action groups such as Family Alliance of Ontario, The Family Mentoring Group in Pennsylvania or are graduates of Partners in Policymaking in the US and UK, are taking more of a leadership role in how personal planning takes place. And as more people supported receive individualized funding they are looking carefully at options for facilitation of the planning and beginning to purchase this service independently.

Someone who is a friend of a person with a disability, or a friend of their family, can also share information they have about planning and encourage the person and/or the family to learn more about it.

Planning Step: Planning the Planning Meeting

The facilitator will want to meet with the person who is planning to get their input about when and where the meeting will happen and who they want to include. You may be part of the pre-planning.

Family and Friends

You may have some good suggestions about who the person could invite to their planning meeting. Perhaps a friend of the family or another connection of yours would be a helpful addition to the group. You may be willing to offer your home for the meeting or suggest another place that appeals to the person. You could also be asked for ideas or help around refreshments.

Planning Step: Physical Setup and Equipment

Family and Friends

You may be willing to lend chairs or help with hosting supplies and refreshments if necessary.

Planning Step: Offering Hospitality



Having a planning meeting has a lot of similarities to hosting a party. You want people invited to feel welcome, to take part and enjoy themselves. Greeting people, taking coats, making introductions, and offering refreshments are all aspects of hospitality, and hopefully can be done by the person and their family and friends.

Family and Friends

Family and friends can help the person to take on some hosting duties, depending on what that person would like in the way of assistance. The person may be a bit shy about this at first but with a little time and encouragement they will likely take to this role gladly. In hosting duties, as in the actual planning, those who care about the person are there in supportive roles.

Planning Step: Getting the Meeting Started: Welcome and Introductions

Family and Friends

One family member or friend may wish to echo the welcome or say something on the person's behalf if they are not willing or able to do this themselves.

Planning Step: Explaining the Planning Process

The facilitator will briefly explain the overall process of the planning and remind everyone of the values on which it is based.

Family and Friends

You can help the person by honouring the values and process of planning.

Planning Step: Establishing Ground Rules

The facilitator will ask everyone if they have any ideas for Ground Rules about how people in the planning group can work together or how they want the meetings to work around things like times and breaks. Before the facilitator gets people's ideas about Ground Rules they will ask everyone to answer a few questions about being in a group:

- What makes you feel comfortable in a group?

- What can others do to make you feel comfortable?
- What helps you speak and share your thoughts?
- What helps you listen to others?

The facilitator will also have some suggestions for Ground Rules if no-one on the group has ideas.

Family and Friends

This is a great opportunity to think about how you experience being part of a group and what helps you to learn and feel comfortable contributing.

Planning Step: Learning About the Person's Past

In order to think about the Future it is really helpful to consider the Past. Some of the things we enjoyed or were good at, and some of the people who were part of our lives may still be important, or they may not. We want to understand which parts of someone's Past they want to keep or reconnect with, and which parts may not be meaningful anymore, but may still provide some useful information in creating a wonderful Future.

Family and Friends

As a family member you have known the person for all or a good part of their life. You have much valuable information to add to what the person has to say about their Past. Often there are people in the planning group, such as support workers and newer friends, who don't know much about someone's Past or their family life, and hearing stories and experiences from the Past can really round out the person for them. Sometimes people bring in photos or tell a few family stories that are important to understanding the person and their life in the Past. Friends will also have great information to share from their unique perspective.

Planning Step: Learning about the Person's Life Now

Just as the person who is planning and those helping them need to know what has been important in the Past, it is also essential to take a look at what life is like in the Present.

Family and Friends

You have important information to add to what the person has to say about their life at Present, especially through additional details that can provide new ideas for the Future. You can also ask some follow-up questions as they occur to you, to help everyone gain a deeper understanding of the person's experiences, preferences, and feelings. And of course, telling the person what you see as their gifts and talents, and what you admire about them has both practical implications for their Future and also helps them to feel proud of their strengths and abilities.

Planning Step: Key Quality Questions

Since the 1980's a question has been coming up at conferences, workshops, and in numerous other discussions:

“What makes up a good quality of life?”

The typical list is full of good answers, including:

- a pleasant place to live
- meaningful activities to pursue
- opportunities to keep growing and learning
- making choices about our lives
- a rich variety of caring relationships
- being a part of community
- chances to contribute to society
- being treated with dignity and respect

Collectively we have done a good job of answering this question; we know what defines a good quality of life but how do we judge if it is present or not? The facilitator will ask a few questions about choice, relationships, community places, growing, learning and contributing, and respect so that people can get a sense of how help needs to be provided to the person who is planning.

Family and Friends

You will likely have some opinions about how paid supports are provided. If there are aspects that you hope will change, try to express any concerns in respectful and constructive ways. Most of the questions ask about the facts of the situation, which can help discussions to take place in a calm manner. It is also important for natural supports to consider how they can grow in helping the person around choices, valued roles, being involved in community and developing friendships.

Planning Step: Learning About the Person's Wishes, Hopes and Dreams for the Future for the Short Term and the Long Term

Family and Friends

You likely have some great ideas about what will make the person's life more interesting and fulfilling. The trick is to offer these after the person has had lots of chances, during the meeting and before, to express their *own* thoughts and preferences about their life.

It is also essential to offer suggestions in ways that don't cause the person to feel obligated to say yes. Frequently people who receive support have not been given enough chances to say no or to express their own ideas, and so it is all the more important to share our thoughts in non-intrusive ways.

Another very important role for families and friends is to be encouraging of the dreams the person *does* express, even if you don't agree with them. Remember that this may be the first time that they have ever been invited to think about and share what they want.

Fears

Family members may have fears about some of the changes the person may want in their life. These are based on a concern for the person's safety and wellbeing and may also be the result of seeing things not go well in the past due to a lack of planning or support.

It is important to learn from the past, but not to let it paralyze us in moving forward. Part of good planning is to make sure all the necessary components are present for something to have the best possible chance for success.

A helpful question is: "***What will it take?***" Then people can list all the conditions that would assist a particular dream to move forward.

However, it is important not to rain on the parade by simply saying something won't work right away, even if it hasn't in the past. During the dreaming part of the planning, it is so helpful to the person for you to stay open to whatever is said. Remember that there will be another part of the process where concerns can be mentioned and possible solutions suggested.

Planning Step: Fleshing Out Dreams and Creating Dream Statements

Once the person has expressed their dreams for the future and others have added suggestions, which the person may want to accept, think about, or not take, there will be a list of dreams that may still be expressed in fairly general terms.

Each dream needs to be looked at more closely and some will need to be fleshed out and expanded on.

Family and Friends

Your role is primarily to encourage the person to phrase things in their own words, and to add to the follow-up questions the facilitator may ask, so that everyone has a clear understanding of each dream's specific details.

Planning Step: Brainstorming Resources to Make Dreams Reality

Each dream is now fleshed out a bit and has been phrased as a sentence, so that people can think as concretely as possible about ways to achieve them.

Family and Friends

You will be invited to think about what you know, and more importantly, *who* you know, to help move the person's dreams forward. We are all aware that good things often happen for us (a new job, a better apartment, a compatible mate) because someone in our life has shared information or a contact. This same approach works wonderfully when we are helping someone plan in a more intentional way. By thinking about your own life... where you go, what you are involved in, and especially who you know, progress around the person's dreams will happen much more quickly.

This is done with respect for everyone's boundaries and comfort level. All that is being requested of planning group members is to ask a neighbour, colleague or friend for more information about a certain activity or place in the community, or if they are aware of anyone else who might have that knowledge. Often people will offer more than what is requested, but that is not the initial expectation. You are rich in resources!

Planning Step: Determining What Supports the Person May Need to Achieve Each Dream

Family and Friends

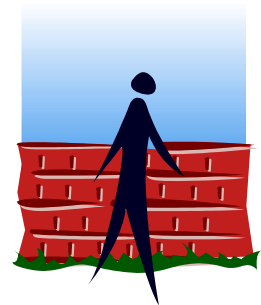
Just as dreams and preferences are different for each person, so is the need for support and even with the same individual this can change from day to day or week to week. Being truly helpful is a balancing act, taking into consideration the person's dignity, independence, self-esteem and ability to participate. In the past, others decided what people with disabilities would do and how

they would be supported to do it. Now we know enough to ask not only in what areas someone might need help but how they want that assistance to be provided.

Planning Step: Identifying Obstacles and Possible Solutions

Family and Friends

One of the Values of personal planning is optimism and it is of particular importance when trying to resolve obstacles. There are lots of ways to accomplish something and there are people who are willing to help. Voicing your fears is important and then hopefully you can trust enough to look at solutions that build in reasonable safeguards.



There is also a certain amount of “letting go” that can be a challenge for some family members and some support staff too. A good question to consider is: “How do we support each other to help the person grow and expand their life, and trust that our relationships with them will be even more meaningful and enjoyable?” There are changes involved for everyone who is part of a planning group and it can take some adjustment, even when these changes are positive.

Planning Step: Creating an Action Plan

Once everyone has come up with all the creative ideas they can think of, some will need to be chosen to work toward. These choices are based first on what appeals to the person and second on who has some ability to act on the ideas.

Family and Friends

When we bring people together to help someone plan the hope is always that some of the non-paid people in their life will take on a few of the Actions that result from the planning. This is not meant to be a burden to anyone and we know that families, in particular, can be exhausted from not having enough other help for their child. Part of personal planning is for everyone to learn how their own networks can be of assistance through the information they have and the contacts they know.

Perhaps you can utilize some of the time you are already spending with the person to explore a couple of ideas that appear on the Action Sheet. If you just can’t take on anything else right now then hopefully others will step in and pursue more of the Actions. Down the road maybe you can increase your involvement, but it is also great that you are coming to the planning meetings and supporting the person through your ideas and encouragement.

What's Important to Ensure That Plans Get Implemented

Many factors contribute to helping Plans on paper turn into dreams coming true through Action. Following are some things to keep checking back on:

- The ongoing participation of a facilitator to help with connections, assist with continued planning.
- Actions should be voluntary and workable, with realistic time frames.
- A date for the next meeting should be set while the group is still together.
- The write-up of the Plan should be accurate and clear and sent out promptly.
- There should be some communication between the facilitator with the person who is planning, and paid and non- paid members of the planning group between meetings.
- Support should be easily available for everyone who has some part in carrying out the Action Plan.
- Evaluation should happen at the beginning of each subsequent planning meeting to see if Actions have been accomplished.

Celebrations



Helping to make dreams become reality requires commitment, hard work and creativity. It is a powerful experience to have your vision of the future realized or to help someone achieve that. People should be very proud of their accomplishments and make time to celebrate large and small successes.

Many of the gains made through planning may seem quite small, but the person and those who care about them know how important it can be for someone to be invited to a co-worker's home, to go out on a first date, to learn a new bus route, or join a People First group. Any of these steps, and many others, could lead to greater things, but are also really wonderful just as they are.

Celebrations can be major events or just a few moments at the beginning of a meeting to acknowledge something good that has happened. From time to time it is really important to have a more formalized gathering, with food of course, to honour the progress that has been made. It is also rewarding to think about what has helped things to move forward. What circumstances and connections and what qualities in everyone have contributed to success? Identifying all those resources can ensure that they continue to be used for ongoing positive change.

A Few Resources About Ways to Plan

Individualized Funding Coalition of Ontario

- *“Creating a Good life in Community: A Guide on Person-Directed Planning”*
www.individualizedfunding.ca

Joyce, Susannah

- *Planning Together: A Guide for Facilitators, Self-Advocates, Their Families Friends & Paid Supports To Help People Plan For A Great Life*
- *“friends in/deed: focus planning to help people develop and sustain friendships”*
- *Meeting The Challenge: A Guide For Respectful, Effective Planning, Advocacy & Support With People Who Have Puzzling Behaviour*

Realizations Training & Resources 519-433-2387

susannahjoyce@rogers.com

www.realizationstraining.com

Logan, Vickie L.

- *“Blaze A Trail...Your Way”*

RR# 4, St. Marys, Ontario N4X 1C7 vlogan@295.ca

Lord, John; Leavitt, Barb & Dingwall, Charlotte

Facilitating an Everyday Life

Inclusion Press 416-658-5363 www.inclusion.com

Mount, Beth

- ***“Personal Futures Planning”***

Graphic Futures 25 West 81st Street, #16B. New York, NY, 10024

212-362-9492 www.capacityworks.com/mountresume.

O’Brien, John and O’Brien, Connie Lyle, eds.

- ***“A Little Book About Person-Centered Planning”***
- ***“Implementing Person-Centered Planning”***

Inclusion Press 416-658-5363 www.inclusion.com

Pearpoint, Jack, O'Brien, John & Kahn, Lynda, n

- ***The PATH and MAPS Workbook :Person Centered Ways To Build Community***

Inclusion Press 416-658-5363 www.inclusion.com

Smull, Michael, et al,

- ***“Essential Lifestyle Planning for Everyone”***

www.learningcommunity.us