

Reviewing other people's plans – A checklist for family mentors

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Before you start

Always remember that the people who are asking you to review the plan want honest feedback, they want to write better plans, but most people also want to hear how well they did. So try to –

- Always look for and point out where people have done well, what is good. Remember that you are not grading the plan, gentle support typically works best. (Don't use a red pen.)
- Remember that while you want to be positive the purpose of the review is to help people have a better, more powerful plan; and
- Remember that a plan is not an outcome; the plan is a vehicle to help people get the lives that they want, that make sense for them. As you listen when people are talking with you about the plan you will find that in many instances they need more help with implementation than with planning.

Do not get pulled into the trap of the perfect plan –

- Help people keep in mind that the plan is only important to the degree that it is useful in helping people get better lives
- To be useful the plan needs to be used – if you are trying to make it perfect you are not using it
- In using a plan learning occurs, help people see how the learning wheel works

Unless you have a remarkable memory, take notes as you review the plan.

Getting started

Before you read the plan ask what its purpose is.

- What do people hope that the plan will accomplish?
- Who will be using the plan? Who is the plan being written for?

Sometimes people are very clear about the purpose of the plan and sometimes they are not. Where they are not clear talking with them about the purpose helps. Plans often have more than one purpose and more than 1 audience. Where that is the case, ask yourself whether or not there needs to be more than

one version of the plan. (Producing multiple versions is easy if you have it on a computer.) As people talk about the purpose they may also talk about what they were able to learn and what they have yet to learn. If they raise things that they need to learn, understand, or figure out – point out to them that there is a section of the plan called “things to figure out” or “questions to be answered” where what you are trying to learn should be written down.

Then ask –

- Is this a first plan? (In which case you are comparing it with 1st plan criteria.)
- If it is not a first plan, which version is it? Your expectations should increase with each version.

Now –

- Read the plan all the way through – from start to finish – without making notes or comments
- Ask yourself
 - Is the plan “respectful” of the person and those who support the person?
 - Does the plan give you the impression that you have met the person?
 - Does the plan meet its purpose?
 - Does the plan “communicate” well?
 - Does it read easily? Is it “user friendly”?
 - If you were supporting the person could you find information that you needed easily?
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Think about these things and then read the plan section by section. As you are reading through the second time some things to look for are:

- Does the plan use complete thoughts but not necessarily complete sentences?
- Does it use simple, every day language and have no jargon or “human service” speak?
- Does each item listed have enough detail and/or enough examples that someone newly present in the person’s life would understand what was meant?
- Ways to help make the plan more readable. Especially avoiding long “laundry lists” of items, instead, those things that go together are grouped together, with a space between groups;

- Where there are 4 or more things grouped together there is a “topic” statement and the others follow as bullets underneath.

Remember that 1st plans typically do not meet all of these criteria. If you are reviewing a first plan, then you want to show people how these criteria apply to the second version of the plan. (While reassuring them that a 1st plan should be a framework for learning that doesn’t have all of the detail that subsequent version have.)

- Always “crosswalk” – look for things in one section that reflect things that should be also listed in other sections

Guidelines to use in reviewing each section of the plan

- In the **administrative section** (or cover page) the reader should learn:
 - Whose plan;
 - When it was done;
 - Who contributed; and
 - Anything else that is required.
- What people like and admire about the person, **positive reputation** should list what other people like and admire about the person.
 - It should list things that we might like or admire about anyone of roughly the same age.
 - It should not include things that we only say about people with disabilities or is “faint praise”.
 - Where there are more than 6 or so items listed they should be grouped to make it more likely that they will be read.
 - Each item should be short, just a word or phrase, not complete sentences
- What is **important to** the person, do these 2 or 3 sections describe what the person perceives as being important to him or her?
 - It must not include items that others think should be important to the person.
 - It should only include those things that the person tells us are important

(with words or behavior).

- The planner should be seeking to include what the person sees as important in –
 - Relationships
 - Rituals and routines,
 - Things to do,
 - Places to be,
 - Rituals and routines
- In the **characteristics of people who support** section the reader learns –
 - The personality characteristics that those who provide support should have if they are to be successful
 - The core skills needed
 - Anything else that you would look for in a person if you were using this list to screen potential candidates to work with the person

(Remember that if we do a good job of matching the people who use services with those who are paid are several benefits. First where there is a good match those who are paid will stay in their work longer. People who are being paid inadequately to have fun stay longer than people who are being paid to “put-up with”. Second that where there is a good match the plan is much more likely to be implemented because there will be a “fit” between those who are paid and what we are asking them to do.)

- In **the support section** the reader learns what others need to know or do:
 - So that the person has what is important to him or her; and
 - Will stay healthy and safe

This is where the balance between being what is **important to** and **important for** between **happy** and **healthy/safe** is described. Where there is a difference between what is **important to** the person and what is **important for** the person this section describes how the difference is best dealt with.

- The **things to figure out** section should be seen as the place to record the questions that people have as they develop the plan. The questions can relate to understanding the person or in how to implement the plan. This section should be treated as a “running list”. That is you write things down that you are trying to figure out and “cross them off” (delete them) as you

figure them out. Help people see that not having all of the answers is expected and OK. There should be things written in this section. Also help people see that part of helping people move toward the lives that they want is having the right questions.

- The **action plan** (if you need one) should describe who is going to do what to help people move toward the life that they want and stay healthy/safe. It often describes what needs to be maintained as well as what will be changed. The reader should know:
 - What is to happen,
 - Who is responsible and
 - The date by when it will happen.

Other headings/sections sometimes used

If plans are to accomplish their purpose some plans will need other sections. These additional sections are used to highlight information and put it in a format that makes it easier to understand. As you are reviewing plans think about whether or not a plan would benefit from having one or more of the sections listed below. Some of the most commonly used additional sections –

Communication –

Used with everyone who does not use words to communicate and anyone else where it is helpful to know how the person communicates with their behavior.

How to help stay healthy

Use this section where issues of health are so important that you want the reader to pay attention to them.

How to help stay safe

Use this section where there are an unusual number of important things about staying safe that you want the reader to know.

Rituals and routines

Where there are important rituals or routines that you want the reader to know about use headings such as “morning routine”, “birthday celebration”, or any other label (followed by a description) that helps the reader know about the important rituals and routines of the person. Whether or not they are included in any plan depends on the purpose(s) of the plan. For people getting extensive

supports and for “safeguard” plans, keep in mind that the less able the person is to be in control of the rituals and routines the more important it is that these be described.

Clarifying roles and responsibilities – using the donut

When there are paid people in someone’s life and you want them to know what you expect of them this may be a way to clarify their roles. To get some more information on how to use this section see “helping staff to support choice” on the web at the www.allenshea.com website.

At the end

Ask yourself –

- Is the plan meeting its purpose?
 - What would help to make it work if it is not? What would work to make it more powerful/helpful, if it is?
- The current plan should reflect what has been learned about what is important to the person, what important for the person, and what we need to know or do to support the person. How can you help create or support a process where everyone continues to learn and act on what is learned.
- Looking at the person’s issues, all of the resources available for support, and starting where the person and where those you are supporting are (at a pace that reflects the opportunities and resources), is this a process that -
 - Is helping the person get what is important in everyday life?
 - Uses what has been learned about what is important to help the person be welcomed by and connected to their community?
 - Uses the resulting associations to look for opportunities to build relationships?
 - Uses the relationships to build a circle of support? And
 - Does all of this with the person and results in an ongoing, evolving vision of desired future?