


# Planning Toolkit

## Acknowledgements

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  - *National Development Team for Inclusion*
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# **Section 1: Introduction**

## An Overview of Planning

- Support planning (or simply “planning”) refers to how a Local Area Coordinator (LAC) or Intensive Planning and Support Coordinator (IPSC) works alongside an individual to develop and implement a personalized plan for living a meaningful life within their community.
- The planning process is flexible and tailored to meet the person’s unique needs and circumstances, such as how fast or slow the individual wants to go and who is involved in their journey.



## An Overview of Planning

- Planning is about understanding who the individual is, what's important to them, and what their vision of a good life is. It is not about fitting individuals into existing services or supports.
- It involves supporting individuals to connect with supports, both natural and formalized, to work towards that vision. These can be supports that already exist but can also be bespoke, innovation solutions that may not exist yet.
- It really is about taking “a plan fits the person”, and not a “person fits the plan” approach.



### **Planning is not...**

- An assessment process
- A process just for deinstitutionalization or major transitions
- A fixed one-size fits all process
- A funding determination process (though it may influence it)
- A static one-off process
- Just about measuring goals

## Planning & Values

- Planning provides a framework for people to be clear about their goals in life and what it is they want to achieve.
- It is anchored in the principles and framework of Local Area Coordination & Intensive Planning and Support Coordination.

Citizenship

Relationships

Natural Authority

Lifelong Learning

Information

Choice and Control

Community


Contribution

Working Together

Complimentary Nature of Services

*LAC Principles*

## Planning & Its Importance for The Human Rights Remedy


- Person centered planning is central to the Human Rights Remedy (HRR) and changing the way we support people with disabilities and their families/support networks in the province.
  - The HRR requires a major change in planning and pathways from people “fitting in” to a limited range of existing programs and services **to** supporting people, one person at a time, to build and pursue their vision for a home and good life in their community of choice.
  - Culturally, this involves a change from people with disabilities as “passive service users” to “active, contributing citizens” with themes of being included, contributing and being recognized, and directing your own life.
  - It focuses on the importance of the right relationship alongside people and asking the right question about a good life in the community rather than “what services do you need?”
  - The HRR provides more powerful tools to support person centred planning, including stronger individual planning and support mechanisms and ratios (LAC and IPSC) and a comprehensive approach to Individualized Funding (IF).
  - Experience has shown that access to Individualized Funding (IF) alone is not sufficient. We must be mindful of the planning processes, pathways and key building blocks that enable these new personalized support arrangements to be envisioned, built and sustained.
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## **Section 2: Getting Started with Planning**



## Planning: Where Does It Begin?

- Before diving into planning, it is important to take the time to get to people well. Relationships of trust begin when LACs/IPSCs meet individuals for the first time. Rather than starting with an assessment and series of pre-determined questions, LACs/IPSCs will take time to listen, get to know a person really well, and start building a relationship of trust.
  - Planning is about thinking, talking and believing what is possible in whatever format works for the person. It really is about taking “a plan fits the person”, and not a “person fits the plan” approach. This could look like:
    - **Kitchen table conversations**
    - **Peer connection cafes**
    - **1-1 conversations over planning**
    - **Formalized planning**
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## Factors to Consider

Planning develops over time and is dependent on a person's needs, goals, and aspirations.

The level of detail involved in developing the plan will depend on:



**A person's individual circumstances:** What stage of life they are at, the nature of the person's goals, and the complexity of support needs.



**A person's preferences and priorities:** Whether they prefer simple, short-term plans or a more detailed support plan.



**Support required:** The type and frequency of assistance required including informal, community-based, or formal services.



**Available resources and opportunities:** Considering funding, community programs, and other relevant options that align with a person's goals/plan.

## Key Elements of the Planning Process

While there are **many approaches to planning**, some **key elements** that guide the process include:

- ✓ Visionary and creative
- ✓ Based on understanding of needs and support requirements from the person's perspective
- ✓ Seeks relevant information from family members, friends, professionals and potential providers
- ✓ Facilitates ongoing network involvement
- ✓ Involves researching and drafting a plan, identifying supports and services and source
- ✓ Examining of options for strategies for making a vision come to life
- ✓ Assists with funding negotiations if required
- ✓ Assists with implementation of the plan



### ***An Ongoing Process***

Planning support remains available on an ongoing basis, especially as this relates to:

- Liaising with the individual, support network, providers, professionals, funding body and the community
- Monitoring and adjusting current services, accessing alternative services or stimulating the development of entirely new ones



# **Section 3: Tools and Templates Overview**

## An Introduction to Planning Tools

- There are different tools that can be used to support the planning process and document information. **There is no one size fits all template. People may want to use a range of different formats to share their goals and aspirations.**
- The LAC/IPSC will use their knowledge, skills, and experience to determine which tools may assist the person to develop the relevant components required for their plan.
- **The following templates have been developed to support the Nova Scotian context. Each tool has different layers of planning which can all contribute to the individual's overall plan for a good life.**

My Plan Tool



Support Plan Tool



Funding Plan Tool



## Tool Considerations



### Preparation

Effective planning begins with preparation. LACs/ IPSCs build relationships before diving into planning discussions or using tools.



### Relationship Building

The time spent building trust and rapport allows LACs/IPSCs to explore new ideas with the person. Planning should be paced according to the individual's readiness, not to meet external timelines or targets. The goal is to create a plan that reflects the person's journey.



### Flexible Scheduling

Rigidly scheduling an appointment to complete the "Personal Profile" section of the plan may not yield the best results. The process should be fluid and adaptable to the person's pace.

## Overview of How to Use This Toolkit

- This toolkit is a resource to **support LACs/IPSCs** through the planning process. The intention of this toolkit is to identify a range of tools that can be helpful throughout different stages of planning and to provide key considerations for their use.
- It is important to acknowledge that this toolkit aims to enable and assist LACs/IPSCs to build their skills, knowledge and competencies over time. It is not intended to be a tick box process to complete the requirements for planning.
- The range of tools within this toolkit that may be useful, **once the relationship has been established and planning commences.**

### My Personal Profile

#### About

- This layer of planning explores who an individual is. It is about learning about what's important to them and what their dreams and aspirations are.
- It can include exploring things they like, dislike, their talents and gifts, the roles they play in their community and everyday life, who is important to them, who they live with and anything that is important for people to know about them.

#### Key Considerations

- This layer should be one of the first things explored with an individual as part of the planning process. This is so you can understand who the individual is and what's important to them.

This section provides an overview of the intention of a specific layer in the planning process.


This section provides some important things to think about when exploring this layer of planning with an individual .

## Overview of How to Use This Toolkit

### Additional Resources

The following are some additional tools and resources that could support the development of My Plan:

- **Shared Agreement:** A shared agreement documents the collaborative understanding between an individual, their support network and their DSP Planning Support Person. It outlines the individual's vision, shared responsibilities and mutual expectations.
- **My One Page Profile:** A simple visual summary of what is important to a person and how they want to be supported.
- **My Community and Personal Network Supports:** A visual tool to support conversation around the individual's connections in community and within their personal support networks
- **Like and Admire (from National Development Team for Inclusion) :** This tool helps to ask about the person's positive qualities, respecting and affirming their individuality and appreciating how they contribute to the communities they are a part of.
- **Important To, Important For (from National Development Team for Inclusion):** A simple visual summary that helps map what is important to the individual and what is important for them as they live their good life.
- **Presence to Contribution (from National Development Team for Inclusion):** This tool is a way of having a conversation with someone to find ways to enable them to be part of their community.



This section provides additional resources that complement each tool that may further support planning conversations



# My Plan Toolkit

# Overview: My Plan



My Plan

**My Plan** is a tool that offers a collection of resources that captures what's most important to an individual and their vision for a good life.



## Layers of planning that might be a part of “My Plan”:

- ✓ **Personal Profile:** Provides a look at who the individual is. It can include things they like, dislike, their talents and gifts, the roles they play in their community and everyday life, who is important to them, who they live with and anything that is important for people to know about them.
- ✓ **Communication Preferences:** Supports the individual to identify their preferred approach to communication.
- ✓ **Vision for A Good Life:** Supports the individual to develop their vision for a good life.
- ✓ **Plan for A Good Life:** Supports the individual to break their vision into smaller pieces to build an actionable plan. This includes identifying any supports that are required to help them get there, including natural and funded supports.
- ✓ **My Shared Agreement:** Supports the individual to document any and all shared agreements between themselves and their DSP Support Person.


# My Personal Profile

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## About

- This layer of planning explores who an individual is. It is about learning about what's important to them and what their dreams and aspirations are.
- It can include exploring things they like, dislike, their talents and gifts, the roles they play in their community and everyday life, who is important to them, who they live with and anything that is important for people to know about them.

## Key Considerations

- A personal profile in person-centred planning provides a holistic view of an individual, ensuring that their unique preferences, strengths, and needs are at the forefront of planning.
  - Profile information can be gathered over time through a series of conversations.
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# Communication Preferences

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## About

- This layer of planning is about exploring how the individual likes to communicate, including how they like to receive information and how they prefer to express themselves.

## Key Considerations

- Communication provides the foundation of understanding what's important to an individual and what their dreams and vision for a good life are.
  - Exploring communication preferences early when getting to know an individual ensures that the planning process is adapted to meet the communication approach of the individual.
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# Vision For A Good Life

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## About

- Developing a vision for a good life is about supporting an individual to dream and think about what they want for their future.
- A positive, well-articulated vision for an individual with a disability is a critical first step to help them get the good things in life.
- Having a vision of what is important in making up a good life allows a person to take control and be clear about the direction in which to head. It can directly influence imaginations of what is possible.

## Key Considerations (1/4)

- Developing a vision can take time.
  - It can sometimes be hard for people to get started, especially if the person has been used to a service driven approach and fitting into services that may or may not be available.
  - Within the conversation, try to “ imagine better” – dream of new and exciting possibilities. One way to do this might be to take disability out of the equation of the conversation for a moment and think about lives of people of a similar age – without disability.
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# Vision For A Good Life

## Key Considerations (2/4)

Developing a vision for a good life is about dreaming and thinking about what the individual wants for their future. It is about thinking about what makes them happy and what's important to them.

Some of the key topics you might want to explore with the individual when developing their vision are:



**Home:** In their vision, explore where the individual calls home.

- *What does home look like for them?*
- *Who do they live with?*



**Family/Friends:** In their vision, explore who is important to the individual.

- *Who do they enjoy spending time with?*
- *Who are the people that support them?*
- *Who are the people they feel supported by?*
- *Are there family members they want to be apart of their support network?*



**Contribution to Community:** In their vision, explore the individual's involvement in their community.

- *What is their involvement today?*
- *Have they had any jobs/roles in community?*
- *What skills do they bring to their community?*
- *What do they enjoy in their community?*



**Capacity Building:** In their vision, explore the individual's capacity.

- *What are their personal growth aspirations?*
- *What new skills/topics do they want to learn?*
- *What big dreams do they have?*

# Vision For A Good Life

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## Key Considerations (3/4)



**Culture:** In their vision, think of how culture influence the life of the individual

- What cultural identities are important to the individual?
- How do their cultural identities impact their day-to-day life, and how does this influence their plan?



**Health:** In their vision, explore what health means to the individual and what environments support them to feel most healthy.

- How does the individual feel overall in their everyday life?
- Does the individual require any supports to support their health?



**Community:** In their vision, explore how the individual would like to be involved/contributing to their community.

- What people/places is the individual connected to in their community?
- What people/places would the individual like to be connected to?



**Education:** In their vision, explore if the individual has any interests in learning opportunities or education

- What learning opportunities is the individual interested in?
- What (if any) opportunities have they tried in the past?

# Vision For A Good Life

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## Key Considerations (4/4)



**Money :** In their vision, explore how the financial factors that are present in the individual's vision.

- Is there room to build capacity?
- Where would they require support to manage finances?



**Activities:** In their vision, explore the activities the individual enjoys in their everyday life.

- What activities does the individual want to explore?
- Are there opportunities to contribute to activities in their community?



**Routines:** In their vision, think of the routines the individuals has in their everyday life.

- Are there key routines that are important to the individual that should be apart of their plan?
- Can specific routines play a role in capacity building for the individual?



**Other:** Support the person to dream big and explore their ideas for their vision for a good life.

- What are their dreams and aspirations?
- What steps can the individual take towards reaching their goals?



# Achieving Goals and Aspirations

## About

- Once the individual has their vision, it acts as a compass for the rest of the planning process.
- This layer of planning is about breaking the individual's vision and goals down into smaller, achievable steps. This supports the creation of an actionable plan to begin working towards the goals identified.
- This layer is important to focus on to identify where support would be needed prior to applying for funding.

## Key Considerations (1/2)

- When building out a plan for the individual's goals, it's important to explore together:

**1 What Needs To Happen:** How can the individual break their goals down into smaller steps? What are the actions that need to happen?

**2 What the Individual Can Do:** What steps can the individual take? What actions can they take responsibility for to begin working on their goals?

**3 Where The Individual Needs Support:** Is there any supports the individual might need to start working towards their goals? What are they?

**4 Who/What Can Help The Individual:** If there are areas that the individual has identified for supports, are there people, places, items that can help them? Are there people, places or items within their community that can support them? Are there gaps in resources where funding may be required?

# Achieving Goals and Aspirations

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## Key Considerations (2/2)

- When breaking the individual's goals down into smaller steps, there are key considerations that we want to keep in mind:



**Building Independence & Autonomy:** Actions and agreements discussed when building the plan should aim to build individual and support network capacity, resilience, and self-determination.



**Exploring Natural Supports & Personal Networks First:** Prioritize exploring what individuals can do for themselves, how family, friends or community can help and secondly, consider services to complement natural supports.



**Embracing Creativity and Innovation:** Encourage individuals to think creatively and explore new, imaginative approaches. Focus on personalized pathways building on their assets and considering new possibilities to achieve the outcomes they want. This could involve leveraging sparks funding.



**Viewing Funding & Formalized Services From A Complementary Lens:** Recognize that funding and formalized services should enhance and support the person's existing community and natural supports. Services can be there to fill gaps and offer additional structure and resources, building on the capacity of the individual's informal support network.

# Safety and Well-Being

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## About

- Building a safety and well-being layer into planning ensures that an individual's physical, emotional, and social needs are prioritized throughout the process.
- By embedding safety and well-being into the planning framework, the process not only focuses on achieving goals but also provides an opportunity for the individual to share what's important in this area for them.

## Key Considerations

- Exploring this layer involves identifying potential vulnerabilities specific to this person, creating strategies to mitigate them, and considering supports that promote stability and resilience.
- It includes open conversations with the individual and chosen members of their support network to identify where safeguarding plans are needed and develop contingency plans for unexpected challenges.
- Working with the individual to identify who should be apart of this planning process is critical. It is essential to create a coordinated network of support that ensures the individual has a plan to promote security and safety. Collaboration between family, support networks, professional supports and services fosters clear communication, fills gaps, and aligns understanding of the plan and responsibilities.
- This includes planning for general emergencies and unexpected situations.

# Shared Agreement Documentation

The following are additional resources used that support the development of Shared Agreements between an individual and their DSP Support Person.

- **Shared Agreement – What Will Happen Next:** A visual chart depicting what the individual would like to happen, what actions they will take and when, who will support them and when, and a review of how they met/are on their way to meeting their goal.

# Shared Agreements

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## About

- Once the individual has their vision, Shared Agreements can act as a tool to determine what happens next, and how.
- This layer of planning is about breaking down the individual's goal(s) to discover and identify next steps.
- This layer of planning is important to hold the individual, their support network, and their DSP Support Person accountable.

## Key Considerations

- When building out a shared agreement it is important to think about:

1

**What the Individual Would Like to Happen:** How can the individual break their goals down into smaller steps? What are the actions that need to happen?

2

**What the Individual Can Do and When:** What steps can the individual take? What actions can they take responsibility for to begin working on their goals?

3

**Where The Individual Needs Support and How:** Is there any supports the individual might need to start working towards their goals? What are they? How can other supports be brought in to bring this person closer to reaching their goal?

4

**What has Happened and How are Things Happening:** How are things going so far? What is going well and what would the individual like to change? How are things happening for the individual while trying to reach their goals?

# Shared Agreement

## Our Shared Agreement- What Will Happen Next

This is a shared agreement between \_\_\_\_\_ (you)

and \_\_\_\_\_ your DSP Planning Support Person.

What I would like to happen	What I will do and when	Where I need support, who will do it and when	Review – What's Happened and How Are Things Happening

## Additional Resources

The following are some additional tools and resources used in other jurisdictions around the world that could optionally support the development of My Plan:

- **My One Page Profile:** A simple visual summary of what is important to a person and how they want to be supported.
- **My Community and Personal Network Supports:** A visual tool to support conversation around the individual's connections in community and within their personal support networks
- **Like and Admire (from National Development Team for Inclusion) :** This tool helps to ask about the person's positive qualities, respecting and affirming their individuality and appreciating how they contribute to the communities they are a part of.
- **Important To, Important For (from National Development Team for Inclusion):** A simple visual summary that helps map what is important to the individual and what is important for them as they live their good life.
- **Presence to Contribution (from National Development Team for Inclusion):** This tool is a way of having a conversation with someone to find ways to enable them to be part of their community.

# My One-Page Profile

My name is: \_\_\_\_\_



What people like  
or admire about  
me is...



What is  
important to me  
is...



What I dislike is...



The best way to  
support me is...



# My Community and Personal Network Supports

What are your favourite **places** to go in your community?



Library



Gym



Park and  
outdoor spaces



Coffee shop  
or restaurant



Community  
Center



Other

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**Who** are you connected to in your community?



Friends



Community  
Members



Volunteers



Teachers



Health workers



Other

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# My Community and Personal Network Supports

What do you **currently** do?



Work



Volunteer



Exercise



Arts and crafts



Explore



Relax



Hobbies



Other

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What would you like to **try**?



Work



Volunteer



Exercise



Arts and crafts



Explore



Relax



Hobbies



Other

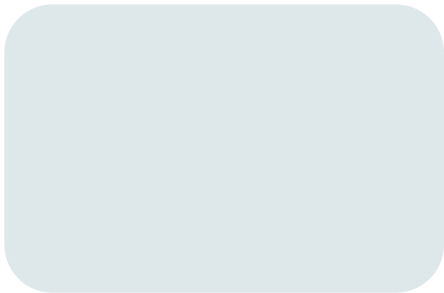
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# My Community and Personal Network Supports

What do you **like** about your community and personal networks?



What would you **change** about your community and personal networks?



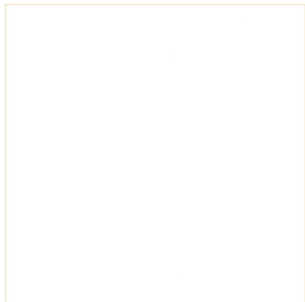
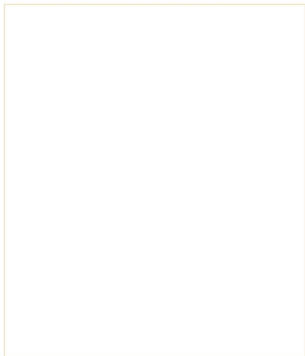
WHAT PEOPLE LIKE AND ADMIRE ABOUT ME...

## Like and Admire

WHAT I'M GOOD AT IS...

**What matters**

**Good support**



**(IMPORTANT TO)**



**(IMPORTANT FOR)**

# Presence to contribution



OPPORTUNITY TO CONTRIBUTE

OPPORTUNITY TO CONNECT

ACTIVELY PARTICIPATING

HAVING PRESENCE

BEING PRESENT

ACTIVITY

# Support Plan

# Overview: Support Plan



Support Plan

**The Support Plan** is a tool that offers a collection of resources the captures the individual's perspective of their support needs and preferences that others should know about when supporting them to live their good life. It can include specific details on support areas such as safety and decision making.



Layers of planning that might be a part of “My Support Plan ”:

- ✓ **Decision-Making Support:** Supports the individual to identify how the like to make decisions and how they like to receive support with decision-making.
- ✓ **Planning for Safety and Security:** Supports the individual to develop a plan for urgent or unexpected situations, including strategies and supports.
- ✓ **Living Arrangement Planning:** If the individual has goals related to changing where they live or are moving to community, this will help them plan for what they may need, including who they want to live with, where they want to live, if they need supports and how I want to receive supports.




# Decision-Making Support

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## About

- This layer of planning is about exploring and understanding the decision-making preferences of the individual. It also helps to explore what decision making will look like for the individual and their support network.

## Key Considerations (1/2)

- This layer supports the exploration of supportive decision making with the individual – a process where individuals with disabilities are part of the decision-making process with support from people that they trust.
  - It is important to note supportive decision making does not replace legal agreements that designate decision makers but offers an avenue to ensure the individual remains part of the decision-making process.
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## Key Considerations (2/2)

Some key areas of decision-making to explore may be:

- **Daily Activities:** Decisions about activities and routines. For example, this could be going outside, spending time with friends, going to the store, etc.
- **Personal Care:** Decisions about bodily care. This could include decisions about personal hygiene, eating and getting dressed for the day.
- **Money:** Decisions about the monetary funds and how they are used and managed.
- **Health:** Decisions surrounding health. This could include scheduling doctors/specialist appointments, administering medication, and medical treatments, etc.
- **Home:** Decisions surrounding home life. This could include living arrangements, location, who the individual is living with, etc.



# Planning for Safety and Security

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## About

- This layer is about supporting the individual to think through safeguards that already exist in their life and/or how they can embed natural safeguards to promote safety and preparedness for unexpected situations.
- This layer might also encompass exploring what an emergency/crisis situation might look like for the individual, and what steps should be taken if they experience an emergency.

## Key Considerations

- It is important to note that the depth of planning for safety and security can look different for everyone depending on their situation. The amount of detail developed will be dependent on the individual and their circumstances.
- While this layer of planning has a focus on urgent or unexpected situations, planning for safety and security can also be embedded naturally into other layers of planning such as shared agreements.
- Safety and security planning can involve external parties that support the individual. It will be important to explore with the individual who should be involved and talk about their roles and responsibilities.


# Living Arrangement Planning

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## About

- This layer of planning is about exploring potential locations an individual would want to live in, as well as where they would want to live. It also explores the potential supports that may be required to assist the individual in their new living accommodations.

## Key Considerations

- This layer of planning might be important to explore if an individual is:
    - Leaving an institution
    - Leaving home
    - Unhappy with their current living arrangements
    - Wanting to live independently
- 

## Additional Tools for My Support Plan

The following are some additional tools and resources used in other jurisdictions around the world that could optionally support the development of My Support Plan:

- **What's Working/Not Working (from National Development Team for Inclusion):** This tool helps people to sort out what is working and what is not working. It supports working out ways to build on what is working and to reduce or stop the things that aren't.
- **Good Day, Bad Day (from National Development Team for Inclusion):** A simple visual summary of what does a good day look like for the individual, versus what a bad day might look like.
- **Decision Making Profile (from National Development Team for Inclusion):** The decision-making profile creates a clear picture about how a person makes a decision and how they want to be supported in decision-making.
- **Communication Passport (from National Development Team for Inclusion):** The communication passport is a helpful tool to map out an individual's communication preferences.

**What's working?**

**What's not working?**

WHAT ARE YOU GOING TO KEEP, DEVELOP OR GROW?

WHAT ARE YOU GOING TO CHANGE OR LET GO OF?



GOOD DAY

BAD DAY



WHAT DOES THIS SAY ABOUT WHAT MATTERS TO ME?



WHAT DOES THIS SAY ABOUT THE SUPPORT I NEED?

## Decision Making Profile

HOW I LIKE TO GET INFORMATION	HOW TO PRESENT CHOICES TO ME	WAYS YOU CAN HELP ME UNDERSTAND	THE BEST TIME FOR ME TO MAKE DECISIONS	THE WORST TIME FOR ME TO MAKE DECISIONS



# Communication Passport



AT THIS TIME

Blank space for notes under 'AT THIS TIME'.



I DO THIS

Blank space for notes under 'I DO THIS'.



IT MEANS

Blank space for notes under 'IT MEANS'.



YOU NEED TO

Blank space for notes under 'YOU NEED TO'.

# Funding Plan

# Overview: Funding Plan

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A graphic consisting of a dark blue triangle pointing downwards, with two teal triangles at its top corners. The words 'Funding Plan' are written in white inside the dark blue triangle.

Funding Plan

**The Funding Plan** is a tool that supports an individual to think and decide how they can use funding to complement their natural supports and support their vision for a good life.



## Layers of planning that might be a part of “My Funding Plan”:

- ✓ **Funding Planning:** Once an individual has applied to IF, a decision has been made that an individual is eligible, and they have participated in an assessment, this will help them begin initial planning for how they want to use the funding they have been allotted and how they want to manage it.
- ✓ **Funding Proposal:** Is a detailed document outlining how the individual wants to spend their budget and how they want to manage each item. This must be submitted to the EFAC

# Funding Planning

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## About

- This layer of planning defines with an individual how they will want to use their Individualized Funding and what their priorities are. This can look like exploring how the funding can be used alongside their community supports, what is available in their community to spend their money on, and how they want to manage their money.

## Key Considerations

- This step happens after the EFAC shares the individual's support level and Individualized Funding range. It can be used to support the development of the required Funding Proposal document.
  - It will be critical to provide information of the different IF management pathways that are available to an individual during this part of the planning process.
- 