

## **A Guide to Key Features of Wraparound and Person-Centered Planning**

### **Preparing for the Pre-Meeting with Family and First Team Meeting**

- Meet with the person to find out who should be invited to the first meeting
- Schedule a pre-planning/meeting with the person and if applicable his/her family in order to get their “story” and go over their strengths and needs in the five areas of safety/health, social relationships, emotional functioning, behavior, and cultural/spiritual
- Work with the person to identify the best planning strategy that will be the best fit for a person (PATH, Picture of a Life, etc.)
- Identify current team members working with the family the person thinks should be involved in the PCP
- Assess whether people from different areas of a person’s life are represented (family, school, and community)
- Initiate conversations with team members separately to identify core strengths to focus on within planning
- Consider a list of questions that can guide information gathering
- Identify issues team members have and their perspectives that may lead to possible barriers to the team process
- Schedule the meeting to accommodate person’s preferences (i.e. think about location, date, and time how to accommodate all team members)
- Assist the focus person, the family, and circle of support in the coordination of the meeting
- Ask team members to look through the gathering information packet ahead of time to collect thoughts; Some team members may need you to go over this with them
- Use the *MN Person-Centered Plan Report Scoring Criteria & Checklist* to ensure that you are prepared to obtain all relevant information

### **First Meeting Process**

- Come prepared to the meeting (flip chart paper, markers, examples of evaluation tools)
- Encourage introductions and “ice breaker” activities
- Review the planning process identified and come prepared to facilitate it
- Begin with the person’s strengths
- Identify where to build on strengths and discuss needs of the family (if applicable,) and focus person in terms of what they need, not services that they need
- Develop an action plan:
  - Discuss how goals will be met
  - Recruit team members to take on clearly identified tasks
  - Break down goals into action items with person responsible for assisting and dates for completion
  - Assess whether both important to and for elements are in balance
- Outline how action plan will be evaluated with people responsible for gathering and summarizing information across quality of life domains.
- Schedule time, date, and location of follow-up meetings before leaving the meeting
- Identify strategies for keeping everyone up to date on progress between meetings

- After the action plan is written (at the next follow-up meeting) make sure the person confirms that this plan is important to them and reflects what they want it to
- Review the *MN Person-Centered Plan Report Scoring Criteria & Checklist* to make sure the plan has addressed critical features and items related to the tool

### **Follow up Meetings**

- Review key elements of the plan including achievement of goals, changes in the person's quality of life, and whether or not supports are responsive and positive
- Go over data for each goal, at each follow-up meeting
  - Count how many goals are achieved
  - Problem solve goals that aren't achieved
- Highlight strengths and celebrate progress at each follow-up meeting
- Document and discuss changes in priorities and needs and new action steps that are developed
- Schedule time, date, and location of follow-up meeting

### **Preparing a Written Plan**

- Use the *MN Person-Centered Plan Report Scoring Criteria & Checklist* to organize written information that is used to communicate the major elements of the plan
- If you are missing information, make calls or contacts to collect additional information and bring this to follow up meetings to address
- Avoid jargon including and use person-centered language in the plan
- Make sure that the final document includes a signature page for the person and his or her designated guardian
- Make sure that the final document clearly outlines who was present at the first meeting and how they were involved in the development and coordination of the plan
- When you have a completed PC-PBS document, review it for accuracy, cultural sensitivity, completeness, and jargon