PEARLS OF WISDOM

Planning - a focus and starting point

When embarking on planning, many people struggle to know where to start. Here are a number of questions that might help to focus our thinking.

1. Why are we planning?

The crucial first question to ask is: why are we doing this? This question will be the same whether we are planning for ourselves or planning alongside family members or close friends we support. Other questions which might help to tease this out would be: what do we hope to achieve from planning? How will planning help us do things differently? Where will planning lead us?

These questions all lead to the big question of vision. What is our vision for our future or that of our family member or close friend, now and in the long term? Planning is a process used to implement that vision. Our vision must drive our planning, rather than vice versa. So, why are we planning? To implement our vision.

2. What is covered by planning?

When planning to implement our vision, it is important to cover all aspects of life. That is why this sort of planning is called 'whole of life' planning. Developing a list is a good starting point and makes the process more manageable. The list can include home life; work; relationships and friends; recreation, play, holidays; passions; education; spirituality; health and healthcare; financial security; choice and decision-making; and safety and security. If there are other aspects of life that are of particular importance, such as communication, add them to the list. Notice that none of these 'aspects' refer to disability, or service descriptions, or to diagnoses. We all have different aspects to our lives, irrespective of the labels and diagnoses we are given.

3. How does whole of life planning differ from other forms of planning?

Whole of life planning differs markedly from service planning and planning aimed at securing funding. Service planning focuses on that area of life where a particular service offers assistance, for example, to support someone to live in their own home. Planning to secure funding is just that – planning that a funding agency requires in order to determine the level of funding that it believes an individual needs. Service planning and planning to secure funding address only certain aspects of someone's life, depending on the nature of the service and the funding criteria. Whole of life planning is broader and deeper and not restricted to the limits of what services and funding agencies offer.

4. Who should be involved in whole of life planning?

When embarking on whole of life planning, it is important that we remain in control of the process and the outcomes. This means that we are in control of who participates. We should ask only those people we trust and those people we believe are committed to us or our family member or close friend. Even if an employee of a service encourages and supports us to embark on this planning, we are not obliged to invite them to participate. Remember, this is not service planning.

People to ask can include committed family members, close friends, circle members and other allies. A range of experience, knowledge and age will bring different perspectives. If we want certain people to be involved in our lives in the long term, or the lives of those we are supporting, including them in planning is a wonderful way to enhance their understanding of important issues and of building their commitment to planning outcomes. Asking an experienced, independent person to facilitate the planning process will enhance effectiveness and allow everyone to participate.

5. What does planning look like?

Typically, planning takes place in an informal setting, such as someone's home, but with sufficient structure to ensure that the time is put to best use. People come together for two to three hours in an evening or on a weekend, with a facilitator leading the process and making sure all participants have their say.

6. What goes in the plan?

Planning is most effective when it includes the following:

- A thorough description of who the person with disability is and what the person's life looks like currently.
- The person's vision and the vision family members and friends have for them.
- Clear and precise goals under various aspects of life, consistent with the vision –goals can be short term and long term and of high and low priority.
- Clear and precise action statements under each goal, including who will carry them out, and when, and who will check they have been completed.
- Detailed notes of the planning session for all participants and chosen others.

7. What happens if everything is not covered in the initial planning session?

It is very common that there will still be work to be done after an initial planning session. In a session lasting two to three hours, there might be time for only two or three goals to be addressed. A second session can be scheduled or the individual or family might decide to work through outstanding areas just with a few chosen individuals.

Either way, after experiencing a structured planning process, many find that planning becomes a way of thinking. Once whole of life planning has begun, it becomes part of everyday life and far less overwhelming than it might first have appeared. With a comprehensive whole of life plan, specific service planning, and planning to secure funding, can be tailored to meet the goals of the whole of life plan.