

PERSON DIRECTED PLANNING AND CIRCLES OF SUPPORT



FAMILY VOICE OF LANARK COUNTY

MAY 29/2019

DEFINITIONS

Person directed – life planning directed by the individual supported with help from others

Person centred – life planning directed by the group for the individual using their knowledge of and experience with the individual

Both of these are ongoing processes to define and organize the best possible future for the individual

Circle of Support - A group of volunteers who truly care about the welfare of a vulnerable individual and commit to working together with the individual to effectively create their best possible life based on their hopes and dreams.

START WITH "WHY?"

Love

Fear



LIFE PLANNING



- Always start where you are and with the end in mind
- Organize info. into resource binders, files folders, expandable files with sections – ie. one for finances, one for personal goals, one for community involvement, one for medical etc.
- Do an outline of your short term and long term goals
- Start planning the transition to adulthood when high school starts using MAPS and PATH for goal setting and community development

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FIRST THINGS FIRST

Finances



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- If the individual has capacity to do a will who will be executor, beneficiary – if they don't their estate goes to a set hierarchy of family, spouse, children, grandchildren, parents, siblings and after that you can set the family hierarchy – if no one gov't gets it
- RDSP, (4 part process – meet with financial advisor, help you to decide in advance how the money will be invested, trustee upon your death, they send you paperwork, you sign and return, takes a few days to sync the accounts with CRA and Employment and Social Development Canada, then call the ESDC to determine the best schedule of contributions to receive the max amount of government contributions, put in your first contribution and set a schedule up
- Henson - set up upon your death – suggested you use 2 trustees, all your assets can go into that account, you can also leave amounts or items to other beneficiaries in your will with the rest of the assets going to the Henson
- Individual's assets cannot be in excess of 40,000 or ODSP funding will be affected. Can set up a TFSA in your name and it will liquify with all your other assets into the individual's Henson. May be a way to save some money long term.
- Base funding, ODSP, and Passport funding also will need a trustee named upon your death, base funding will only go to a third party agency (10% admin fee), Passport can be managed through a third party agency or by trustee, ODSP goes to individual directly and can be managed by trustee. Employment revenue may affect ODSP payments as will inheritances – check the rules

HIRE A FACILITATOR?

- Facilitation is process where a neutral, objective professional helps a person with a developmental disability makes decisions about long term life planning and helps develop an action plan.
- Make sure they are certified, what are their qualifications and experience
- Meets with the individual and parent(s)/caregiver to discuss the person's dream life, goals, wishes
- Objective and observant, builds a level of trust and rapport, and is a strong advocate for the individual
- Good listener and takes time to understand the person's strengths and capabilities to help develop the plan
- May help facilitate the circle of support meetings initially to ensure they get off to a good start
- Graphic facilitator can create PATH and MAP planning tools to identify key relationships between individuals and the community
- Typically spends 6 months to a year with the individual



PROFILES

- Profiles are a one page descriptor of who an individual is
- Create profiles so all who work with your loved one can get up to speed of the type of support they need
- Works for in home training for workers, helps family members who spend time with the individual
- Can help the circle of support in their work through better understanding of where the person is
- Can make different types of profile pages ie. Medical/behavioral/community involvement/personal information

My One Page profile

Your Name Age: Occupation:

What people appreciate about me

What is important to me

How to support me

GRAPHIC PLANNING

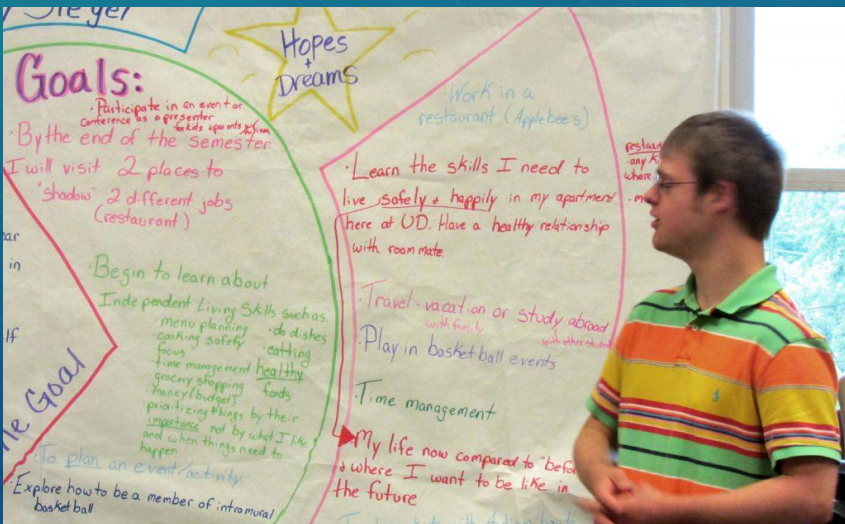
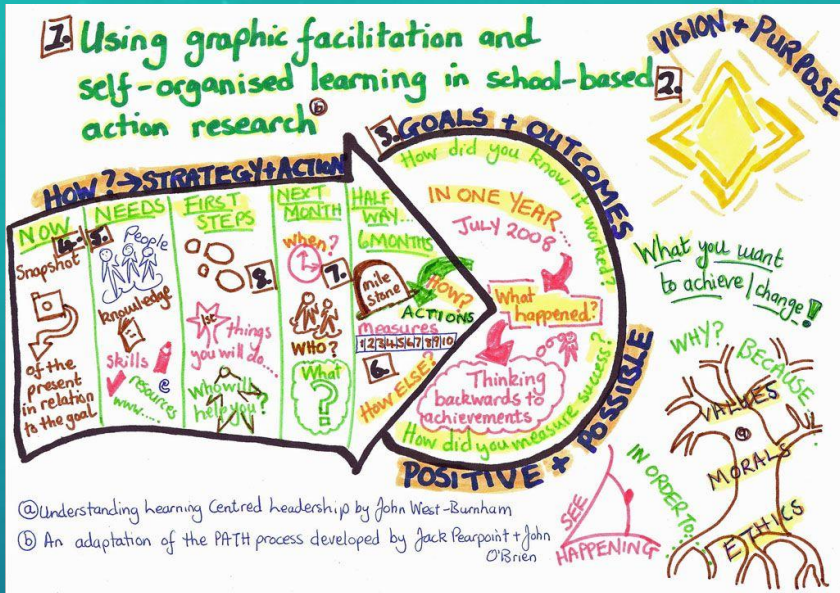
PATH AND MAP

PATH – Planning Alternative Futures with Hope

- Used more for goal setting and strategies to get there

MAP - Making Action Plans

- Used to define supports and to build community inclusion
- Graphic and visually colourful, fun
- Work well for individuals with developmental disabilities as pictures symbols are used – not all can read



CIRCLES OF SUPPORT

Who do you already have

- Parent(s)/Legal Guardian, Family, Friends, Neighbours, Individual's Friends

Talk about your vision to people that you would like to have on board

- Most of us do not want to ask people for help
- By talking about your vision and getting people informed about your ideas, you may get people to volunteer
- Having had the initial visionary discussions it won't come as a surprise when you do ask people and it may be easier for them to say "Yes"
- Teachers, EA's, individual's friends, high school volunteers
- Relief workers, health professionals. People who have common interests
- Community partners, program leaders and volunteers, religious leader



CIRCLE MEMBERS



- The individual is the star director
- One member or hired facilitator, calls the meetings, sets the agenda with input from all, runs the meeting and keeps it on track, facilitates discussion, helps when issues occur
- Secretary – takes notes, distributes minutes with action items noted
- Parent or Legal guardian – supplies a wealth of information
- Trustees for banking/funding/RDSP/Henson to inform on funding available
- Members can be in charge of an area ie community programs/employment/medical appts. and bring ideas to expand activities and connection
- Others can be members at large, new members are brought in as needed

MEETINGS

Group facilitator (professional or otherwise) sets agenda with input from members, keeps to the agenda, moves meeting along, deals with conflict/issues when needed

- Find a comfortable, convenient location
- Set ground rules for the group
- Include the individual
- Skype or facetime in members who are not local
- Keep it positive and possible
- Get group members involved in presenting ideas
- Offer refreshments
- Add some fun

Always remember who you are there for



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GETTING STARTED

THINK BIG...START SMALL

1st meeting

- Get to know each member
- Set the group rules and post every meeting
- Talk about where the individual is and what is in place, their hopes, dreams, goals and ability
- Do a graphic MAP to determine the established relationships and connection to community
- Determine a schedule of meetings, monthly, quarterly – depends on the work to be done
- Eat cake

Subsequent meetings

- Posting the MAP each meeting can help keep things on track
- Action items from one meeting can determine next meetings discussion and who is presenting
- Always allow time for AOB – new info.
- Plans need to be flexible to changing needs and interests, pressing issues
- Use PATH to brainstorm goals, develop strategies, outline tasks and set schedules
- Always bring it back to the individual

financial

estate planning –
will/Henson/
RDSP/taxes

caregiving – just
enough support
hiring/training/
scheduling/
payroll

trustees/legal
guardianship

funding –
Base/ODSP/
Passport/
sponsorship/c
aseworker

housing –
rent/utilities
insurance/municipal
taxes/maintenance

budgeting/
banking/
purchases/
filing

per sona

self care and
life skills/
good habits

day programs/
home schedule

suitable
home setup

in home supports
cooking/laundry/
cleaning

education

faith/
spirituality

safety and
security

health and
medical/
therapists

equipment
and assistive
devices



Community involvement

transportation

appointments

volunteering

Shopping/
errands

employment/
work placement

citizenship

Eating out/
cafes

organizations

fun



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the arts
-creative
endeavors

music and
entertainment

fitness

nature

Sports/
adaptive
equipment

Communication/
media use

social hood

leisure
activities

vacation

travel/
documentation

PROBLEM SOLVING

As a group

- Always keep the group rules posted at every session to refer to
- As group evolves members will leave because of illness, death, relocation, life, or loss of interest – group will need to bring in new members
- Group dynamics – issues may arise between members – they should try to work out differences themselves before involving the facilitator
- Group brainstorms on issues, come up with possible solutions, develop action plan, follow up with it, report back to group

For the individual

- Change in finances may dictate a change in access to programs and activities, paid supports
- Programming and activities – are they enjoying it, have they developed other interests
- Life changes ie move to a more accessible home, long term care, health and medical, hospital stays
- Behavioral issues – determination of what is happening, and goal setting using PATH, professional help

SUMMARY

- Life Planning is determined by the individual with support
- Circle of support is committed for life though memberships can change
- Life planning is flexible to meet changes in situation and choices and is always evolving
- Life planning is peace of mind for parents/caregivers and the individual



WHERE TO FIND HELP

- Financial advisor – some banks don't do RDSP directly but the financial advisor can help you make decisions about investing and liaison with their head office before you do the application
- Lawyer – check out Persona Law Group - personallawgroup.ca – understand estate law for people with DD – lots of info. on website
- Accountant - income taxes, Henson fund taxes etc. (free income tax service in Lanark County – certain conditions apply)
- Person Directed Planning PDF on MCSS site
<https://www.mcass.gov.on.ca/documents/en/mcass/publications/developmental/GuideonPersondirectedPlanningFinal.pdf>
- Inclusion Press Toronto – many books on PDP, facilitation, PATH, MAPS
- Citizen Advocacy, Service Coordination, DSO in Ottawa offer many workshops, basically free
- Check out websites – Families Matter, Walk in My Shoes, P4P Research Group, Ontario Independent Facilitation Network



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