

Basics of a Person Centered Planning Process

1. Interview
2. Schedule, Forms, Q&A
3. Discovery Session
4. Plan Development
5. Plan Approved and Delivered

Identify and interview the planner to ensure a good match.
Ask about planners experience and training.
Where was training received? How long was the training?
What qualifies the planner?
Ask to see a sample of a plan (redacted, of course.)

Planner develops an overview in a One Page Description.
Plan is developed.
Reviewed by client/family.
Plan provided in paper and/or electronic file for easy updates.
Annual review and updates.
Update plan as changes occur.

Plan is developed.
Review by person & family to ensure the document reflects the individuals vision, preferences and support needs.



Schedule a discovery session.
Convenient time and location.
Prep for Review.
Discovery event conducted and information reviewed.

When safe, a group event with the individuals the person wants. During the pandemic, this is being done electronically.
Approximately 1.5-2 hours.
All in attendance contribute.
Review conducted by planner.
Planner compiles combined knowledge.