

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

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

- Identify current team members working with the family
- Identify needed members of the team from each major life area (family, school, and community) including anyone who has daily contact or makes decisions (e.g., school, family, natural supports, child and family services, mental health, medical, etc.)
- Lead initial conversations with team members about purpose and process
- Identify issues team members have and their perspectives that may lead to possible barriers to the team process
- Initiate conversations with each team member separately to identify core strengths to focus on within planning
- Schedule a pre-planning/meeting with the 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
- Schedule the meeting to accommodate family needs (i.e. think about location, date, and time to accommodate all team members)
- Include the focus person, the family, and circle of support in the coordination of the meeting
- Use a prepared list of interview questions as a guide for gathering information.
- 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 KIPBS PC-PBS Checklist to ensure that you are prepared to obtain all relevant information, as you plan for the meeting

First Meeting Process

- Come prepared to the meeting (flip chart paper, markers, examples of evaluation tools)
- Everyone introduce themselves and their role separate from simply their job title
- Summarize the meeting goals and process so everyone knows what to expect - Consider developing a meeting agenda prior to the meeting
- Develop a mission statement for the family and team that is agreed upon and articulates what the team wants to do
- Begin with the family’s and team’s strengths
- The team should develop a good understanding of the person’s preferred lifestyle including type of living situation, with whom they want to live, work or other valued activity, with whom they want to socialize, and social (or other leisure or religious) activities
- The team should identify how opportunities for choice will be provided, including the person’s preferred mode of communication, support and training if needed, and helping the person to identify the consequences and risks associated with choices
- Identify where holes exist in the strengths and discuss needs of the family and focus person in terms of what they need, not services that they need
- Develop an action plan
 - Discuss needs and determine what how needs can be met

- Action plans should be clearly connected to each of the person's preferred lifestyle issues including type of living situation, with whom they want to live, work or other valued activity, with whom they want to socialize, and social (or other leisure or religious) activities
- The team should establish 5 priorities or action steps for the supports listed in the action plan
- If behavioral action plans or statements are included in the preferred lifestyle goals and interventions, they should be clearly linked to specific preferred lifestyle issues identified by the team. Significant behavioral issues should be specifically targeted through function based interventions.
- The development process for function based interventions should be described for those who are not familiar with this process
- Enroll team members to take on clearly identified tasks
- Outline action plan evaluation with people responsible for gathering and summarizing data, including how the team will evaluate changes in the person's preferred lifestyle, achievement of goals or skills, and whether or not services or supports continue to be responsive
- 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 consumer or their designated individual signs off on the written plan.

Follow up Meetings

- Review key elements of Consumer Preferred Lifestyle including achievement of goals or skills, changes in the person's preferred future lifestyle, and whether or not services or supports are responsive
- Go over data for each goal, at each follow-up meeting
 - Count number of goals achieved
 - Problem solve goals that aren't achieved
- Highlight strengths and 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 the Written PCP-PBS Plan - Consumer Preferred Lifestyle Sections

- The Preferred Lifestyle sections of the written PC-PBS Plan are intended to communicate information about a consumer so that someone can understand the consumer's preferred lifestyle and the services and supports needed to help them achieve it
- Use the KIPBS PC-PBS Checklist to make sure you have all the information needed to prepare a good written plan
- If you are missing information, make calls or contacts to collect information and document in the plan the dates and times of additional contacts
- Avoid jargon including, technical language etc. If this information is included, explain the meaning, in terms that the average reader can understand
- Make sure that the final document includes a signature page for the person or their designated individual

- Make sure that the final document clearly outlines who was present at each 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, completeness (using the KIPBS PC-PBS Checklist), and technical jargon or language