



Person Centered Planning Checklist

1. Initial Conversations

- Find out from the person if and when they want to fill out their assessments or have a quality of life (QOL) conversation.
- Conduct assessments/QOL conversation (may be part of Preparation Meeting, but may not).
- If/where/when/who they want to meet to prepare for their meeting. Would they like any support contacting people and/or scheduling this?
- If/where/when/who they want to meet for their official planning meeting. Would they like any support contacting people and/or scheduling this?
- Would the person like to have an ally to help them to prepare for and/or bring to their meeting/s (for communication or moral support)? If so, whom and would they like support in enlisting this ally?

2. The Preparation Meeting

- Find out what topics or QOL domains they are most interested in or concerned about.
- Would they like to communicate topics of less importance to them to the planning team ahead of time? Would he/she like any support in distributing this information? (Follow all HIPPA regulations in sharing personal and confidential information)
- How does the person wish to express their voice at the meeting? What tools do they need to do so (i.e. their own report, poster, slideshow, practice, etc.)? Who would they like to support them in creating or obtaining these tools?
- What type of goal planning techniques would they like to use at their meeting (meaningful vs essential, visual/graphic representation, etc.)
- All goal planning tools, techniques, reports, etc. are obtained/and or completed prior to the planning meeting.

3. The Planning Meeting

- The environment is comfortable and accessible to the person and everyone they have invited.
- All discussions are conducted with the person's permission and centered on their input.
- The input of all those who love, care, and support the person is valued, and each team member is respectful of the person and each other.
- All language and questions asked during the goal planning meeting should be respectful and person centered.
- Efforts to reduce or eliminate program speak (i.e. community outings) and professional jargon was made.
- The support team is on the same page, and that all discussions are transparent to the person whose meeting it is.
- The person has the final say on all decisions, goals, and support plans.
- Goals are written in a respectful and person centered way.
- Everyone is clear on next steps, and committed to their role in support of the person and their plan.
- Person centered practices and interactions are role-modeled and encouraged.
- Redirection, reflection, and paraphrasing were used to emphasize person centered language, curb interrupters, and support ownership of opinions (if needed).
- Person centered resources and education were offered where appropriate, and if team appeared open to it

4. The Plan Itself

- Strategies were created to support the lifestyle the person wants for their life today.
- Goals increase community membership, not just community observation.
- Person has valued roles and relationships (if desired)
- The plan is unique, and clearly speaks of and represents the person.
- If needed, follow-up calls are made to fill in any missing information that was not covered in the meeting. Updates and changes are verified first with the person, and then communicated to all interested parties.