

We're Better Together *Facilitating better plans through partnerships*

Facilitating planning is a skill and an art form – it involves gathering and incorporating information from different perspectives into a living set of documents that reflect the person's choices. It is no small feat, nor is it one that a Services Coordinator or Personal Agent (SC/PA) can accomplish in isolation.

Facilitating planning requires “experts.”

Recognizing expertise is a valuable skill in any facilitator's kit. It is the first step to facilitating planning in partnership, as it helps us figure out what type of information is needed and with whom we might collaborate. It is also useful in building relationships by noting each person's contribution and validating his/her perspective. There are two types of “experts” involved in good plan facilitation.

“Process experts” know the rules. They are familiar with required documents and how they are to be completed, which is key to ensuring a person's supports are in place as needed. This is the facilitator's (SC/PA's) role in planning.

“Content experts,” on the other hand, have the crucial information that needs to go into the plan and planning documents. These are the meaningful details about the person's life, perspective, goals, preferences, and choices. **The primary content expert in any person's life is him/herself.** In addition, others who know and care about the person may be able to provide valuable information, with the person's permission of course.

Identifying the content experts in a person's life lets us know who might have insight or relevant details needed for planning, and it can help us gather meaningful information about the person. However, we must not stop at naming content experts. We need to learn more about the relationships in the person's life in order to know with *which* content experts to plan.

Just because someone knows the person, does not necessarily mean that he/she should automatically be involved.

We all have people in our lives who we trust, and who might support us to make plans or decisions. In the same regard, we may have some people in our lives with whom we choose NOT to discuss personal matters—who, for a variety of reasons, we do not enlist for help when we make decisions or plans. When facilitating a person's plan or gathering person centered information to contribute to planning, the same notion applies. It is important not only to find out which supporters are in the person's life, but what type of relationship they have and how the person feels about their involvement in planning together.

How do we know which supporter in a person's life is a good candidate for planning together? The key is to recognize with whom the person has meaningful connections as well as his/her choice regarding their involvement. Asking supporters the following three questions can give us valuable insight into a person's relationships:

1. How long have you known the person, and how much time do you spend together?
2. What do you admire most about the person?
3. When was the last time you had fun together, and what did you do?

Answers to these questions can help us understand the person's relationships better. Specifically, they can tell us if who we are asking has spent enough time to know the person well, and whether or not they have developed a personal connection – if he/she has direct knowledge of what is important to the person. This may be different for everyone.

Effective plan facilitation is not a solitary task. It involves partnerships and collaboration. As SCs and PAs are the designated ISP facilitators in Oregon, understanding and using partnerships is vital to gathering meaningful person centered information in a way that works for the person. These tips and points to consider help to make sure that each person on a planning team (whatever this may look like in the person's life) understands his/her role and is able to contribute meaningful information efficiently. By working together, we can develop better plans—plans that truly reflect the person's perspective, meet his/her needs and honor his/her choices.