

Disability Resource Hub Disclaimer

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keeping the plan alive

Gathering information and recording actions is a good start, but we also need to think carefully about how to make sure that actions are put into practice, and that plans are living documents rather than paperwork filed away and never used. There are endless ways to keep plans alive, just a few different formats have been included here – the supporting important to table, questions for implementing plans, using 4 + 1 Questions for using implementation. This information includes some general tips for ensuring that plans are used as living documents.

It is also essential that things that are described as being important to the person are honored by those supporting them. Looking at the things that are important to someone and asking some questions about it can help you think through whether actions need to be set or if something needs to be in place to monitor how this is going.

Look at the information and ask

Are the things that are important to the person consistently present in their life? If not, what do people need to do to ensure that deliberate efforts are made to support people to have what's important to them in everyday life? Using the Supporting Important to template is one way to record learning and new ideas while documenting how often the things that are important to the person occur.

capturing actions that are clear

In order to ensure that plans stay relevant and active over time, it's important to pay attention to how actions are recorded in the first place. If there are things that need to be maintained, rather than requiring new actions, instead of recording actions as "ongoing," set specific actions about how & when the situation will be reviewed. It is common to see actions recorded like this:

Who	Will do what	By when
All	Ensure that Sarah's mobility is maintained	ongoing

Ideally, we should see something like this:

Who	Will do what	By when
Jane (team leader)	Make regular times with Sarah and staff, to explore how Sarah's mobility is going, and ensure we record: <ul style="list-style-type: none">new things we're learning about how to best support her with mobilityany questions or concernsnew actions to follow up to ensure Sarah stays as mobile as possible for as long as possible. Try using 4 + 1 questions, What's working/Not working, and learning logs to gather information.	Starting: 5.9.10 13.10.10 8.11.10 15.12.10 (set new dates for 2011 on 15.12.10)

In the first example, there is nothing specific that anyone needs to do, and no date for it to be done by, making it likely that no one will do anything about it. Action records should be a space to record new things, or the latest step in relation to an existing issue.

Building on information about Important to

Sometimes things that are important to a person are in conflict with what's important for them, or people are not sure about what this actually means to the person. In this kind of situation, people may not be able to identify immediate actions within the meeting, but need to try different things and record what they learn in the weeks and months after the meeting.

For example

During Peter's meeting everyone agreed that having as many coffees as he liked during the day was important to him – this could mean up to 15 coffees in one day. Peter's staff and doctor were worried that this was too much and was not good for him. Some people decided that they needed to stop Peter drinking that much coffee. Others said they needed to learn more about what is really important to Peter about coffee. Staff paid attention to this after the meeting and learned that it was not just about drinking coffee, but the fact that staff sat and talked with Peter when they assisted him with his coffee. Peter did not have any communication system that enabled him to initiate conversations, but he could indicate that he wanted a cup of coffee.

This learning after the meeting resulted in new actions, and changes to the way people supported Peter

People began to trial new ways to support Peter to communicate that he would like someone to talk with him. He now has different picture symbols stuck on the tray of his wheelchair that he is learning to use to communicate with.

They also started to make sure that people talked to him more often than just when they were assisting him with tasks. Peter still enjoys his coffee but also gets to have a chat during other parts of his day.

Staff also made a referral for a communication assessment for Peter, but while waiting for that to happen, they began to record and share what they knew and were learning about his communication.

Where to keep the plan

Agreeing on where the plan will be kept and how it will be used is also important. If a plan is kept in the filing cabinet and staff are busy and not often in the office, the chances of them looking at it are slim. One copy may need to be kept in a file so it can be formally updated, but it's important to also have a working copy that the person holds onto or that is kept somewhere that's easy to access and that is in an obvious place for new or casual staff.

creating opportunities for conversation

If people are struggling to think about who a plan might become a working/living document, you could:

Choose one person's plan for each team meeting to look over new things that have been added.

Start team meetings with staff each sharing 1 thing that's working well about supporting an individual, or something new that they've learned about the person.

Create regular informal opportunities for people supported to talk about what's working and what's not working for them about how their plan is being used. Do the same for staff teams to comment on using the plan in their day to day work.

When reviewing the plan don't just check that actions have happened. Also check that things that are important to the person are present in their life.

Look at ways to make the plan more interesting and exciting for people to look at – this can happen over time and involve the creative talents of staff, family or others in the person's life.

Create space for people to comment and add information to the plan (having it typed in landscape rather than portrait can be a good way to do this).

The important thing is to keep plans on the agenda and if one idea doesn't work, reflect on why and then try a new one.