

INTERNATIONAL FREEDOM AGENDA

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Person Directed Planning and Budgeting.

What follows is a set of guiding principles which reflect the aspirations of all individuals—those with and without disabilities. If we are to become more efficient fiscally and raise the quality of life of the person served then a new way of both person directed planning and budgeting must be developed. This process begins the search for real quality and fiscal responsibility. These principles and practices are particularly relevant and assume that the person to be served is given an allocation deposited in a fiscal intermediary.

1. Guiding Principles: freedom/authority/responsibility

A. definition of “person centered planning”:

a process directed by an individual, with impartial assistance when helpful, focusing on their desires, goals, needs, and concerns to develop supports to live a meaningful life maximizing independence and community participation. All quality standards are outcome-based. The plan will be based but not limited to six universal quality standards and the person's budget allocation.

- shift power to the individual with proper and welcoming support when necessary. It might be a peer mentor in mental health, a broker in DD and aging ,or, any solution that keeps the process free of conflict-of- interest.
- driven by individual with careful support when necessary.
- real choice, not options of current programs. The person must see and understand all of the living options.
- competency – every person is competent to develop their plan (Rhode Island law assumes competency), unless a court has determined otherwise, in which case the person should still direct the planning as much as possible with proper support or accommodations.
- Communication of any type including behavior, mood etc. will be taken into account
- We will define: supported decision making/substituted judgment/best interest

This kind of planning and budgeting together is a revolutionary way to help transform long-term care. Pre planning to the extent it happens now is simply a review of the current status of the individual. Here we posit high expectations for the person served. This means that we will develop a planning and budgeting template to help individuals and circles/mentors to enable the person to purchase both within human services and outside the present system in creative and cost effective ways. This kind of planning and budgeting requires responsibility from the person and unbiased assistance is always available.

Pre-Planning

Prior to meeting as a circle pre-planning is essential to being able to reach for the new quality standards.

- identify family/friends/impartial direct support staff and professionals to invite (at request of the individual). These will have to manifest a commitment to the very foundation of planning and budgeting and high quality standards.
- ensure that plan and the planning is conflict-of-interest free and that well trained brokers are available.
- date/time of planning meeting(s) is at the convenience of the person served
- place of meeting is convenient for an individual

The actual plan may have to be developed over time. This kind of planning and budgeting is not a one-time meeting with quarterly updates. It is an ongoing process where individuals and circles if possible can rearrange budget line items to create improvements.

- cultural considerations – language of the home and ethnic traditions are taken into account.
- goals/desires/concerns are gathered
- what will/will not be discussed
- what is the allocation/private income/what are current expenses

Planning – will require a very different approach to melding both high quality standards and budgeting-line item by line item. Once this totally new approach is in place, individuals can effectively reach for each of the quality standards that get incorporated into the budget template. Planning then becomes a more personal and exciting way with individuals buying only desired items and on paying for deliverables, e.g., in a month by month reimbursement. For example, instead of paying a provider the old way to help obtain employment (The provider usually gets paid under a contract with the state whether the person obtains meaningful employment or not) a person then can purchase employment supports on a month by month basis thereby ensuring there are results and that the system is more cost efficient. Planning is focused on strengths and preferences and the new quality standards

Natural and community supports are considered first, then support options based on a budget template that incorporates the new quality standards. This is the most important ingredient in the whole process of planning. Unless these quality indicators are part of the process the old system will continue. The

quality standards below come from both individuals with disabilities and those without a disability. These quality standards are universal, based on the right of everyone with a disability to seek a meaningful life normed on quality that all of us take for granted: good health, a place to call home, support for existing friendships and long term relationships and creating new ones, becoming an active member of one's community, gaining control of the means of transportation, and, for working age or interested persons of any age, the right to pursue private income and asset protections.

These quality standards are fundamental to changing the present system to one with the person at the center and any assistance is invited. It will lead to discussions of what an individual "gets" in the present system, what costs are involved, and then looking to purchase a meaningful life.

Planning and budgeting for six areas of life:

Health and safety with special attention to:

- choice of primary physician and dentist
- choice of specialists
- annual and routine check-ups
- home is safe/modified for safety when needed
- emergency plan is developed
- (other health/safety concerns—especially long term committed relationships)

Home

- option of where to live – freely chosen and in community
- lives alone or with people at mutual agreement or at their request
- people can only enter house/room with their permission
- staff and staff roles within the house are now fixed on assisting with plan implementation and are hired by the person/circles.

Relationships

- plan to regularly visit family and friends/have family and friends visit them
- method to spontaneously visit with/have visitors over
- plan to develop/support to maintain friendships and explore long term committed relationships
- plan for opportunity and/or support for romantic relationships

Community

- where does/will the person shop for groceries/clothes//other.
- will they belong/join/participate at a place of worship
- what will they do for recreation – plays/movies/sporting events/beach/restaurants/.
- importance of joining community groups may be essential to true integration
- what kind of cultural/educational events will the person undertake
- will they belong/join/participate in a social/political/social organization

Generation of private income/asset protection

plan for employment/employment advancement
self-employment/micro enterprise
what supports are needed for employment or the generation of private income—this can include passive income development like becoming a landlord
where does/will the person do their banking
will the person utilize asset protections (Sherlock plan/trusts/ABLE accounts)
will the person use online banking/credit cards/checks? Asset development will also be a major part of planning especially with retired individuals

Transportation

how will this person reliably get to work
how will this person spontaneously go out
how will this person go on overnight/long trips
how will this person be able to transport others if they choose

Choice of services and supports – who will provide supports

Understand options – plain language

budgeting - control of funding (fiscal intermediary available) and the ability to create a flexible plan
home freely chosen by person

Post Planning

distribute plan to individual and others
ability to change – reconvene circle--problem solve
assessment to ensure compliance and quality
appeals – generated quickly with prompt response

Training/Support

for individuals
for support coordinators/plan writers/brokers trained deeply on this new approach
(without this training the entire enterprise can fall apart)

Real Life Quality Standards and Creative Individual Budgeting: these two training and implementation templates will become the basis for completing the ‘PLAN FOR A MEANINGFUL LIFE’