

How Person-Centered was This Planning Process?

Data collection should include observing at least one meeting whose intended purpose is to develop a plan or a part of a plan, interviewing the meeting facilitator after the meeting, and reviewing the written plan generated either from the observed meeting or from the wider planning process of which the meeting was a part.

Fully Present = 2 Somewhat Present = 1 No Evidence = 0

1	The facilitator encouraged participation by all those present, without some monopolizing time and others remaining largely silent. (Mtnng. Observation)	More than half of members spoke up during mtng. Or facilitator made significant effort to include everyone's input	Around half of members spoke up and contributed	A minority of those present monopolized meeting; no or very minor facilitator efforts to draw people in.
2	Notes were recorded in such a way that everyone's contributions were included and everyone could follow the sequence of ideas. (Mtnng. Observation)	Agenda followed, flip chart, LCD projector, or other visual aid used to assist group members in following along	An agenda distributed, but not followed or incomplete record made of contributions, or recorded in a way not understandable to everyone	No agenda, no minutes or notes recorded that captured contributions
3	Generic community resources (e.g. non-disability organizations or opportunities) and informal supports (e.g. social relationships) were brought into the discussion. (Mtnng. Observation)	More than 3 nondisability focused opportunities discussed	1-3 discussed	No discussion of nondisability-focused opportunities
4	Positive statements of the focal person's capacities and interest were mentioned often; negative or disability-related information playing no or insignificant role. (Mtnng. Observation)	Strengths & interests discussed with little focus on deficits/weaknesses	Some discussion of strengths/interests but deficits and disability/problems included	Discussion heavily disability or problem focused
5	Several planning participants made commitments to actions beyond the planning meeting. (Mtnng. Observation)	Majority of members made commitments	50% or less of members made commitments	No specific action commitments made, other than by the facilitator
6	Planning participants knew the focal individual across several life domains. (Mtnng. Observation + Facilitator Interv.)	Planning team included people who knew individual in 3+ different contexts, i.e. paid prof., co-worker, friend, family,	Members knew indiv. in 2 different domains	Everyone present knew person in same capacity, e.g. all paid staff, all family
7	The focal individual actively participated in this planning process; either at the meeting itself or in another meaningful way for a good reason. (Mtnng. Observation + Facilitator Interv.)	Individual fully present/engaged for 60% or more of mtng.	Present & engaged for less than 60%, or input from individual gathered outside mtng. and shared at mtng.	Not present or not engaged in mtng., contributed no input

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8	If plan options were discussed, the individual was centrally involved in evaluating and selecting among them. (Mtnng. Observation + Facilitator Interv.)	Majority of the time	Some but less than 50% of time	Focal individual never or rarely involved in decision making
9	The focal individual played a central role in deciding who to invite to be a part of this planning process. (Facilitator Interv.)	Individual fully involved in deciding who is invited.	Consulted but not in charge of the decision or only some of the time	No or perfunctory involvement re. who to invite
10	A record of the planning meeting (notes or minutes) was sent to participants following the meeting. (Facilitator Interv.)	Facilitator or other group member always sends out minutes or notes that capture what happened in the mtnng.	Mtnng. notes or record sometimes sent out, or only to some members	No record of the meeting is sent out or it doesn't capture what happened
11	The facilitator and focal person discussed groundrules (e.g. how decisions were to be made) and topics to be covered prior to the meeting. (Facilitator Interv.)	Individual fully involved in deciding agenda, discussing groundrules	Individual consulted or assists with creating agenda & groundrules	Focal person not involved at all in deciding agenda or groundrules
12	Plans made in connection with this planning process included both formal and informal supports for the focal individual. (Plan Review)	For every disability focused service, at least 1 nonsegregated/informal support in plan	Some informal supports in place although the majority are disability focused	No natural or generic supports planned

TOTAL (0 - 24) = _____