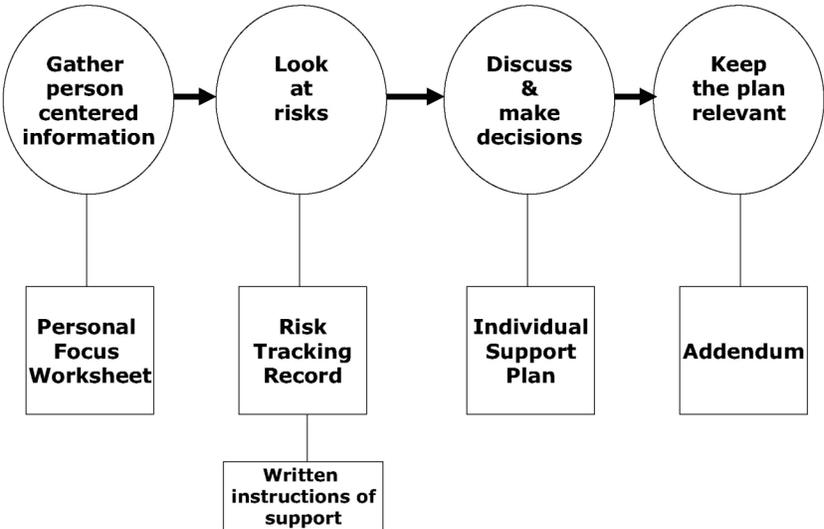


# A Brief Overview of the Review of the Individual Support Plan System For Comprehensive Services

*Findings and Recommendations*



Prepared for the  
**OREGON DEPARTMENT OF HUMAN SERVICES**  
**Seniors and People with Disabilities**

By  
Allen, Shea & Associates  
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## **A Brief Overview of A Review of the Individual Support Plan System for Comprehensive Services: Findings and Recommendations**

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### **Primary Purpose of the Review<sup>1</sup>**

To see how the Individual Support plan (ISP) process is working and, to see what changes could make it a better process.

### **What's in the report?**

Themes gathered from: a) Conversations with sixty-nine residential and vocational services providers and family members, two hundred forty-five surveys, and two hundred seven plan reviews; and b) What we learned from the nine hundred plus comments of individuals, families, providers, and county staff.

### **ISP process in three parts**

It was suggested that we look at the process as three components: those events and activities that happen before the planning meeting (for example, risk-tracking pre-meeting, development of agenda, personal focus worksheets); the meeting itself (for example, developing action plans); and, the events and activities that happen after the planning meeting (for example, carrying out and updating the plan).

### ***What We Learned About 'Before the Planning Meeting'***

#### ***What Makes Sense?***

- The concept of a blended plan supports greater communication and collaboration between residential and vocational service agencies.
- The addition of the risk-tracking record, protocols, and the safety plan makes sense.
- Gathering information about the individual through the Personal Focus Worksheets.

#### ***What works well?***

- Identifying a strong team leader.
- Updating protocols, support documents, safety plans, financial management, and behavior plans at pre-meeting.
- When residential and vocational staff and the service coordinator attend the pre-meeting.
- The pre-meeting is successful when all team members have been communicating throughout the year about the individual.

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<sup>1</sup> **Note:** This brief overview does not include the tables and charts that summarize information learned from surveys, plan reviews, or focus groups.



### ***During the Planning Meeting***

#### ***What makes sense?***

- Asking individuals and families before the meeting whether or not to discuss personal topics.
- Holding the pre-meeting can help the team manage time for the ISP meeting more efficiently.
- A single signature page for the supporting documents and the service page summary makes sense.
- Reaching agreement about what and how changes to the plan can be made.

#### ***What works well?***

- Individuals can have a 'voice' in the meeting.
- When team members have attended the pre-meeting and when everyone has received and reviewed the agenda and materials.
- Sending out a letter to all team members before the meeting as a reminder to bring meeting materials and be prepared.
- Holding the meeting in a comfortable, casual place and offering snacks.
- A skilled facilitator, recorder and a timekeeper (if needed) supports a smooth and efficient meeting.

#### ***What doesn't make sense?***

- There is 'no room' for [individuals with disabilities and their families] at the meeting; the focus is most often on getting the paper completed.
- The focus on the individual can be lost in the timelines and process.
- The personal focus worksheets don't seem to mean anything. They don't really get addressed in the meeting.
- There is often no discussion of what has occurred with the individual in the past year.

#### ***What isn't working well?***

- Lengthy meetings often occur when team members haven't attended pre-meetings.
- Families just want to know about health, happiness and activities, etc.
- When an agenda isn't distributed before the meeting.
- Vocational services representatives aren't always trained on the process and sometimes not very involved.
- Health-related information that doesn't meet the 'criteria,' is not reported in the risk-tracking document or in the ISP.





***Who participates in planning meetings?***

The information gathered during the plan review shows that most individuals and about a third of their families attended the planning meetings (along with staff from Residential and Employment/Community Inclusion agencies and the service coordinator). About 16% of individuals and 65% of families said they did not attend these planning meetings.

***Is the plan connected to information gathered by the team? Does it reflect someone's lifestyle preferences? Is it a balance between what's important to and for the individual?***

Fifty-two percent (52%) of the Action Plans reviewed were about things that are 'important to' the individual, while 42% of the items focused on 'what was important for' the individual. About 20% of these 'important to' Action Plan items reviewed in the ISPs did not appear to be identified as priorities on the Personal Focus Worksheets.

***Does the plan provide good guidance for direct support staff? Does it make their work easier?***

General agreement from survey responses that the plan makes working with the individual easier, however, this information is clearly at odds with what we learned from focus groups. In fact, some agencies have developed separate, easy-to-understand summaries that serve as outlines for direct support staff on how to successfully support someone.

***How do agencies view the planning process? Has it made a difference in the ways that agencies collaborate? What about one plan versus two or more?***

Focus group information indicated that among those who attended, there was a high level of dissatisfaction. Participants in focus groups often mentioned increased communication between residential and vocational service agencies. Many feel that the blended plan is best described as a residential services plan.

***How do counties view the planning process?***

While a small number of responses, in general, about one-third of County staff were somewhat or not satisfied with the activities before and during the planning meeting and with the plan itself.

***What is the amount of time that the process takes?***

Survey information indicates that the average time spent by those who are involved in pre-meeting activities is about eight hours (range of 1-40 hours). The average of planning meetings reported by providers in response to the survey is about two hours (1-3+ hours). Provider focus group participants suggested that, by and large, the payoff is not worth the current investment of resources.

**∞ IN SUMMARY: TWO PROVIDER’S PERSPECTIVES ∞**

“...The new ISP results in a clumsy document that’s very hard for staff to understand and implement. It’s also extremely confusing to families. In the [third] year of implementation, providers [are] taking shortcuts, for example, using [the] same personal focus worksheets as last year...[Its believed that this is done] because of being overwhelmed by process, paperwork, and general confusion...”

“...We recognize how stressed community organizations are and how important it is to spend our resources wisely. Many have commented that there are lots of good parts to the new ISP - much of what I hear people saying is that they want it to be more efficient...”

**DISCLAIMER**

**OPINIONS EXPRESSED IN THIS REPORT DO NOT NECESSARILY REFLECT THE OPINIONS OF THE OREGON DEPARTMENT OF HUMAN SERVICES, SENIORS & PEOPLE WITH DISABILITIES.**