



**Policy & Procedure Manual**

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**ANNUAL SUPPORT PLANNING – R-I-5**

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**POLICY:**

In adherence to OPTIONS northwest's Mission and Vision, the Annual Support Plan (A.S.P.) provides Recipients of Service with opportunities for full citizenship, autonomy, self-determination and social inclusion. Personal Support Services is committed to using the philosophy of Person Centered Planning to learn about and assist people to realize their goals, dreams, hopes and desires.

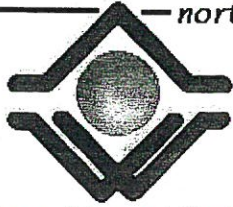
Within 6 months of coming into service with Personal Support Services, annually and as required, each individual will be supported in the planning process. This plan encompasses the Annual Support Plan (A.S.P.) and the Individual Support Plan (I.S.P.) and is in accordance with Ontario Regulation 299/10 Quality Assurance Measures, Part II (5).

**PURPOSE:**

1. To ensure there is a standard process in place which will be ongoing and responsive to the needs of the individual.
2. To ensure the Planning process is applied in a consistent manner in all residential areas.
3. To ensure there is a system in place which will review the circumstances of an individual's life. This includes monthly summaries, six month progress meetings and the annual support plan meeting.

**PRINCIPLES OF ANNUAL SUPPORT PLANNING:**

1. The goal of the A.S.P. is to put the individual and their family in charge of the planning process.
2. The Annual Support Plan Manual is used as a guide when completing the A.S.P.
3. Services are identified and created around the person's gifts, capacities and dreams.
4. Supports necessary to achieve and maintain the person's dreams, wants, and needs are identified.



**PROCEDURE:**

**A) CLERICAL SUPPORT WILL:**

**PRIOR TO THE ANNUAL SUPPORT PLAN MEETING:**

1. 60 days before the date of the individual's annual planning meeting, and in accordance with the Annual Support Plan Tracking Sheet (**see Appendix A**), Clerical Support will send notification (**see Appendix B**) and all necessary forms to the Supervisor for distribution to the Primary Counsellor. For staff's convenience and, to ensure all steps of the Annual Support Plan process are completed, an Annual Support Plan checklist will be attached to the notification (**see Appendix C**).

**PROCEDURES FOLLOWING THE SUPPORT PLAN MEETING:**

1. Once all documentation has been handed in for typing, clerical will update the A.S.P. tracking sheet.
2. Clerical will type all documents from the annual support plan meeting, upload all information to the individual's CIMS file and send a copy to the supervisor.
3. Within 30 days of the planning meeting Clerical will forward a copy of the A.S.P. to all Planning Team members who request it. The A.S.P. sent to the person acting on behalf of the individual will also include a cover memo (**see Appendix D**) inviting them to complete the annual support plan satisfaction survey (**see Appendix E**) to be returned in a self-addressed, stamped envelope.
4. The completed A.S.P. Satisfaction Survey will be forwarded to the Director of Personal Support Services for follow-up then placed in the Feedback file on the Administration Shared Directory.

**B) THE PRIMARY/SECONDARY COUNSELLOR WILL:**

**PRIOR TO THE ANNUAL SUPPORT PLAN MEETING:**

1. Upon receiving all required forms and notification of the individual's annual planning meeting from their supervisor, the Primary/Secondary Counsellor will facilitate the Person Centered Planning process. Section I and II of the Annual Support Plan Manual (**see Appendix F**) will be reviewed to understand the Person Centered Planning process, how to create the A.S.P. and how to set goals.
2. The Primary/Secondary Counsellor will complete sections A and B on page 1 of the Annual Support Plan (A.S.P.) (**see Appendix G**) including all forms and assessments as indicated. The Individual Support Agreement (I.S.A.) (**see**



Personal Support Services

**POLICY: R-I-5**

**DEPARTMENT:** Personal Support Services

**CATEGORY:** Personal Planning

**EFFECTIVE DATE:** October 2013

**SUPERSEDES VERSION DATED:** March 2009

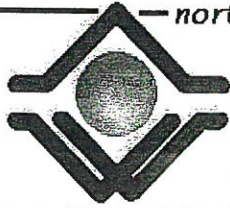
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**Appendix H for a completed example)** will be completed up to and including page 4.

3. The Primary/Secondary Counsellor is responsible for coordinating the A.S.P. meeting. It will be held at the most appropriate date, time and location which enable the individual, persons acting on their behalf and other members of the Planning Team to attend.
4. Assist the individual to determine a planning team who know and are involved in their life and who have indicated an interest in helping them reach their goals. Review the membership of the Planning Team on page 2 of last year's A.S.P. with the individual to ensure the membership is acceptable. The Planning Team may be comprised of but is not limited to:

Recipient of Service	Friends/Family/Guardian	Occupational Therapist
Primary Counsellor	Residential Supervisor	Physiotherapist
Secondary Counsellor	Behavioural Analyst	Social Worker
Community Agency Staff	Dietician	Psychiatrist
Registered/Visiting Nurse	Psychology Staff	Teacher
Adult Protective Services Worker	Other support workers	

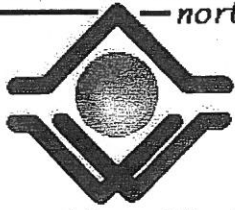
5. Support the individual to approach and invite these people to participate in the planning process. **(see Appendix I for an example of an invitation).**
6. Complete page 2 of the Annual Support Plan ensuring the planning team members are identified, including relationship, who invited them and the date of the invitation. If the planning team member is requesting a copy of the A.S.P. complete the contact information.
7. Ensure that established procedures for confidentiality and the collection, use and transfer of information related to the individual and persons acting on their behalf are followed (see Confidentiality of Information Policy HR-II-2 and Collection, Use and Disclosure of Service Recipient Personal Information Policy AD-I-10). Ensure the Authorization to Collect/Disclose Personal Information form found on page 3 of the A.S.P. is completed.
8. Complete page 4 of the A.S.P., ensuring discussion with the individual and persons acting on their behalf has occurred. This page will also be reviewed with the Planning Team at the meeting.
9. Support the individual to be involved and present throughout the pre-meeting planning process. The individual and/or the person acting on their behalf may wish to assume the role of Planning Coordinator and this should be encouraged.



10. Using the A.S.P. Manual and with input from the individual, the person acting on their behalf and members of the planning team as available, the draft A.S.P. will be completed. As indicated in Section III of the A.S.P. Manual, the Individual Support Plan (I.S.P.) including all protocols, support plans, strategies and guidelines will be reviewed and updated as required.
11. If the individual refuses to participate in the group support planning meeting, give them the option of a private meeting with the person of their choice. If the individual refuses all person centered planning, this will be documented and reported to the supervisor within 5 days. The supervisor will meet with the individual and develop alternate planning strategies within 14 days.
12. Ensure the recommended long term and short term goals identified prior to the meeting are documented on page 11-12 of the A.S.P. in measurable and observable terms. Identify strategies to obtain them and who agreed to do what, by when.
13. The Primary/Secondary Counsellor will support the individual to contact the person acting on their behalf, where appropriate, within one week of the meeting to determine their attendance. If they are unable to attend, the Primary/Secondary Counsellor will assure them that any input they have will be raised on their behalf at the A.S.P. meeting.
14. Ensure the current A.S.P. draft, and the individual support plan binder is available for review at the planning meeting. Refreshments should also be available.

**DURING ANNUAL SUPPORT PLAN MEETING:**

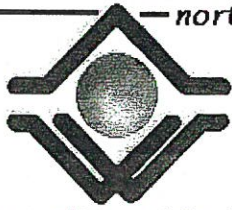
1. Support the individual to attend their A.S.P. meeting and advocate on their behalf to ensure activities and supports are identified to meet the individual's needs and wishes. Overall accountability throughout the planning process is to the individual. If the individual is not willing or cannot attend, the Primary/Secondary Counsellor will advocate on their behalf.
2. Individual/Person acting on their behalf/ Primary/Secondary Counsellor will Convene and facilitate the meeting explaining the planning process to the team members answering questions around why we plan, how it works and what it can accomplish. Introduce the members of the Planning Team and their relationship to the individual.
3. Ensure that the individual is the central and most important person during the planning process and that they are listened to and emotional support is provided as required. All information should be presented in language the individual can understand and, if necessary, receives the services of an interpreter. The individual's rights will be respected and adhered to as outlined in OPTIONS "Service Principles and Recipient's Bill of Rights".



4. Ensure the individual and all other Planning Team Members sign the A.S.P. Attendance sheet on page 13.
5. Share the information on page 4 of the current A.S.P. with the planning team.
6. Review the results of the risk/rights assessments.
7. Complete question 1 on page 5 of the I.S.A. indicating any barriers in reaching last year's goals. The individual, person acting or advocating on their behalf will complete question 2 on page 5 of the I.S.A., sign and date it.
8. Review pages 5 through 10 of the draft A.S.P. with the planning team members adding input as required. Attach any reports submitted.
9. All suggestions made by any member of the Planning Team will be investigated for feasibility if approved by the individual.
10. Goals identified by the individual and their planning team will include a plan of action that will outline who will assist and what they will do to help the individual attain their goals. It may be necessary to prioritize the goals that have been identified.
11. Ensure any individual concerns are adequately addressed.
12. Attempt to resolve differences and bring them to a satisfactory conclusion. If unable to do this the Supervisor will attempt to arrive at an appropriate resolution to the decision.
13. Thank everyone for attending and adjourn the meeting.

**PROCEDURES FOLLOWING THE ANNUAL SUPPORT PLAN MEETING:**

1. Ensure an accurate reflection of the discussion and decisions made at the Planning meeting are documented on the A.S.P.
2. Assist the individual to complete a Support Plan Satisfaction Survey as applicable (**see Appendix E**) and leave it for the supervisor with the other documentation identified below.
3. Within 5 days of the planning meeting photocopy the draft A.S.P and all other documents in the I.S.P. binder. Leave the originals in an envelope for the supervisor to review and the photocopies will be placed back into the I.S.P. binder.



4. Once returned, ensure the final typed copy of the A.S.P. is read and explained to the individual in language suitable to their level of understanding. Date and sign the bottom of page 1, section C, of the A.S.P. indicating this was done. Place all updated typed documents from the A.S.P. meeting in the individual's support plan binder. The draft photocopies will be removed and destroyed by shredding. Ensure the current and previous A.S.P. are available in the ISP binder with most current on top and destroy all others by shredding.

#### **MONTHLY SUMMARY UPDATE:**

1. By the 10<sup>th</sup> of each month, the Primary/Secondary Counsellor will summarize the information from the previous month related to the individual's goals, successes, health and well-being, medical appointments, PRNs, relationships, education, safety, independence, choice making, behaviour and activities. The contents of the summary shall include information from the individual's progress notes, all relevant charts i.e. B.M. sheet, seizure record, weight chart, and the appointment record. This information as well as appropriate recommendations will be documented on the Monthly Summary Update (**see Appendix J**) and will be presented at the team meeting.
2. Whenever possible the individual will be assisted by the Primary/Secondary Counsellor to attend the meeting. The person acting on their behalf will be made aware of the date and time of these meetings should they choose to attend.
3. If the individual was not able to attend, the report will be reviewed with them in language they can understand and placed in the monthly summary update section of the Individual Support Plan binder.
4. If requested, a copy of the update will be sent to clerical who will forward it to the person acting on the individual's behalf.

#### **SIX MONTH PROGRESS MEETING:**

1. Five months after the A.S.P. meeting, the Primary/Secondary Counsellor will complete the Six Month Progress Report (**see Appendix K**).
2. The purpose of the six month progress meeting is to provide an updated report on the supports being provided to the individual. The Primary/Secondary Counsellor will review all monthly summary updates, relevant information, and documents to identify planned and unplanned interventions that have happened since the A.S.P. meeting. Any revisions to goals will be identified with a target date for completion.
3. The report will be presented at the following team meeting and those Planning Team members required will be invited to attend.