

**NORTH COUNTRY COMMUNITY MENTAL HEALTH
NORTHERN AFFILIATION
ADMINISTRATIVE MANUAL**

CHAPTER: Affiliation Chapter 3
PROCEDURE NAME: Independent Facilitation for Person-Centered Planning
PROCEDURE NUMBER: 3004

POLICY

PURPOSE

PROCEDURES:

- I. All persons receiving services will be informed about the option of having an *Independent Facilitator* conduct their Person-centered planning (PCP) meeting.
- II. Definition: An independent facilitator is a trained volunteer that will facilitate the individual's PCP with the CMHSP.
- III. Target Population: All persons receiving public mental health services from the Northern Affiliation or its member boards. (Exception: persons receiving short-term outpatient or medication only services and persons receiving substance abuse services).
- IV. Informing consumers about the choice of Independent Facilitators of their PCP.
 - A. The Northern Affiliation and its' member boards will provide each individual accessing services with information about person centered planning and independent facilitation. This information is contained in the community mental Health Member handbook.
 - B. Any time a new plan is being developed the consumer will be provided a Member Handbook.
 - C. Consumers will be asked as part of the satisfaction survey if they were aware of the option of an independent facilitator.
 - D. Consumer educators will speak with consumer groups about PCP education including information about the option of having an independent facilitator.
- V. Requirements of an *Independent Facilitator*.
 - A. Be a volunteer of the Northern Affiliation or its member boards.
 - B. Be at least 18 years of age
 - C. Demonstrate competency
 1. Interview process
 2. Successfully complete a training program
 3. Successful complete a competency test
 - D. Must not be financially connected to the individual for whom the plan is being developed.
 1. An employee of CMHSP or contract agency that provides supports and services to the individual and is not assigned to person receiving the services may be a facilitator, but would not be considered an independent facilitator.
 2. Cannot be a provider of support as a result of the PCP process.
- VI. Recruitment
 - A. Advertisement in a poster/flyer format about the need and the requirement will be developed and distributed in agency lobbies, businesses in the community, and to local volunteer organizations
 - B. One/two times per year, advertisements for volunteers could be placed in local newspapers.
 - C. Consumer speakers will recruit independent facilitators from existing consumer groups.
- VII. Training Program
 - A. Each volunteer independent facilitator will need to successfully complete a training program.
 - B. A summary/review test document will follow the training program.

- C. A volunteer that can successfully complete the summary/review document may forgo the training program.
- D. Independent facilitators may seek support from staff at the Northern Affiliation and Member boards through the Member Services departments.
- E. If desired the volunteer could attend the CMH monthly training/curriculum and updates.

VIII. Demonstrate Competency

- A. Complete volunteer paperwork
- B. Successfully complete training program and/or the summary review test.
- C. Complete any necessary paperwork as part of the PCP process.

IX. Stipend

- A. Volunteers may submit a form for a \$25.00 stipend per meeting completed.
- B. Compensation will not be dispersed until the evaluation forms have been received by the agency.

X. Evaluation

- A. Of the individual facilitator
 - 1. After the PCP process meeting participants will be asked to complete an evaluation of the meeting process and the role of the facilitator.
 - 2. The facilitator will distribute evaluation forms.
 - 3. A meeting participant will be asked to collect the forms, seal them in a stamped, addressed envelope and to drop the envelope in the mail. The forms will be returned to the member services department at the Northern Affiliation.
 - 4. At the facilitators support meeting, they will be asked to identify barriers, solutions and to evaluate the level of support they are receiving from the agency and if they are any unmet training needs.
- B. Evaluation of consumer awareness of independent facilitators being an option for them.
 - 1. An agency satisfaction survey or interviews of consumers, family members and advocates will be asked:
 - a. If they were aware of this option
 - b. If they have used the option
 - c. If they were satisfied with the process and the outcome.
 - 2. A log will be kept of the training, presentations to consumer about this option.

XI. Role of the Facilitator:

- A. To define the PCP meeting details through documented pre-planning process.
 - 1. Identify the participants, time and location of the planning meeting
 - 2. Identify who will record the meeting minutes
 - 3. Identify what issues the consumer wishes to discuss in the meeting
 - 4. Identify issues that the consumer doesn't want to discuss
 - 5. Record the consumer's current hopes and dreams
 - 6. Identify the services desired to obtain the desired hopes and dreams
 - 7. Identify barriers to obtaining the desired hopes and dreams
 - 8. Identify health and safety issues
 - 9. With the consumer, invite the participants to the planning meeting, arrange for refreshments, etc.
- B. To facilitate the meeting:
 - 1. Ensure the meeting is being recorded
 - 2. Ensuring that the consumer's desires and requests for services are clear
 - 3. Help the consumer and his/her support person identify treatment goals, objective, and plans to achieve the desired hopes and dreams
 - 4. Help the group come to a consensus about goals and services
 - 5. At close of meeting, distribute evaluation forms.

- C. After the meeting:
1. The supports coordinator, or agency representative will submit the recorded goals and recommended services and follow the request through the agency process.
 2. Services are to be authorized within 14 days of the meeting. Ensuring that the consumer is aware for the Grievance and Appeals process is they are not satisfied with the outcomes of the authorization process.
 3. If services are not authorized a compromise between the worker/agency and the consumer can be reached or another planning meeting can be convened.
 4. Volunteer submits paperwork as required.

REFERENCES:

DISTRIBUTION:

REVISED: October 10, 2003

APPROVED:

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