

DEVELOPING YOUR PERSONAL HEALTH PLAN

This workbook belongs to

The person supporting you with this plan is

They can be contacted on

Introduction

This workbook is designed to help you develop a Personal Health Plan. It is divided into three sections.

The first section is a series of tools and exercises that can be useful in helping gather information for the plan. The second section is tools and exercises that will help you develop outcomes and then design and plan what your support will look like. The third section is a template of the criteria for what should be in a Personal Health Plan. You can use this as a place to record the information that you gather when using the first part of the booklet. You do not have to use the first part of the workbook; it is just one way of helping you write a plan. You do, however, need to write a plan that meets the criteria described in the second part of the booklet and in the accompanying document '7 Criteria for a Good Personal Health Plan'.

If you are planning for yourself you could use this workbook to help you. You may find it useful to sit down with other people who know you well and who could help you plan. It is really important that the plan is co developed with those clinicians that support you with your health condition so that the plan has a balance. If you are writing the plan on behalf of someone then you may find it useful to use this workbook with the person and their family and the people who know them best and spend the most time with them, including the clinicians that support them.

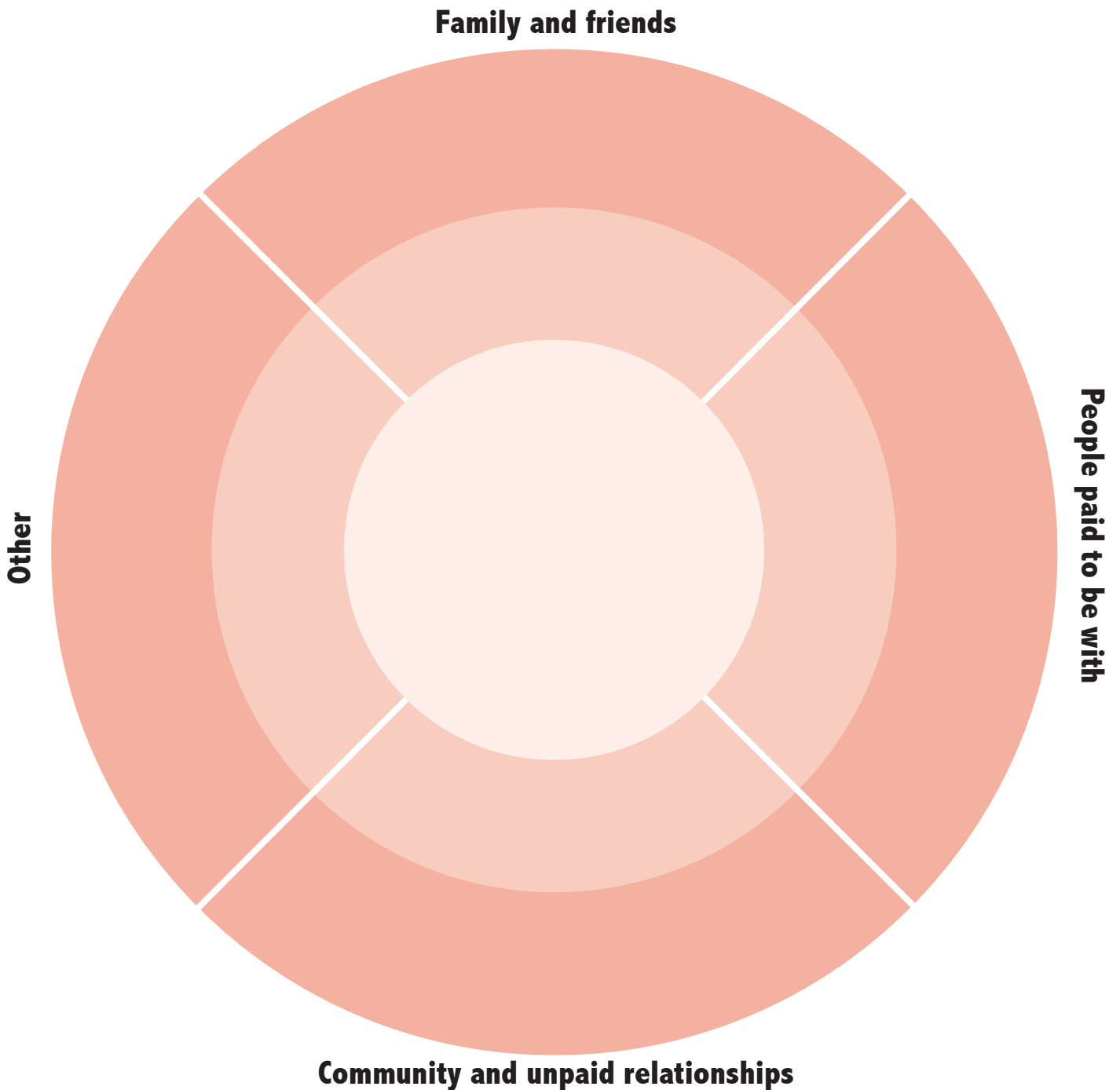
**DEVELOPING
YOUR
PERSONAL
HEALTH PLAN**



SECTION 1

Who is in my life?

This relationship map will help you map out the people in your life that could help with your plan and your life.



What you need to know about how I make decisions?

This grid is to help you think about how you are best supported to make decisions.

This is how I like information presented to me	This how to present choices to me	This is how you help me understand the information being presented	These are the best times to ask me to make a decision	This is when it is not a good time to ask me to make a decision

The information from this page can go under Criteria 6

Who can help me make decisions in my Personal Health Plan?

This grid should help you look at the support you might need (as described above) when making different decisions in the planning process. You might want to come back to this grid throughout the planning process.

Important decisions in my life	Who will help me with these decisions - how will I be involved and what would it look like?	Who will make the final decision

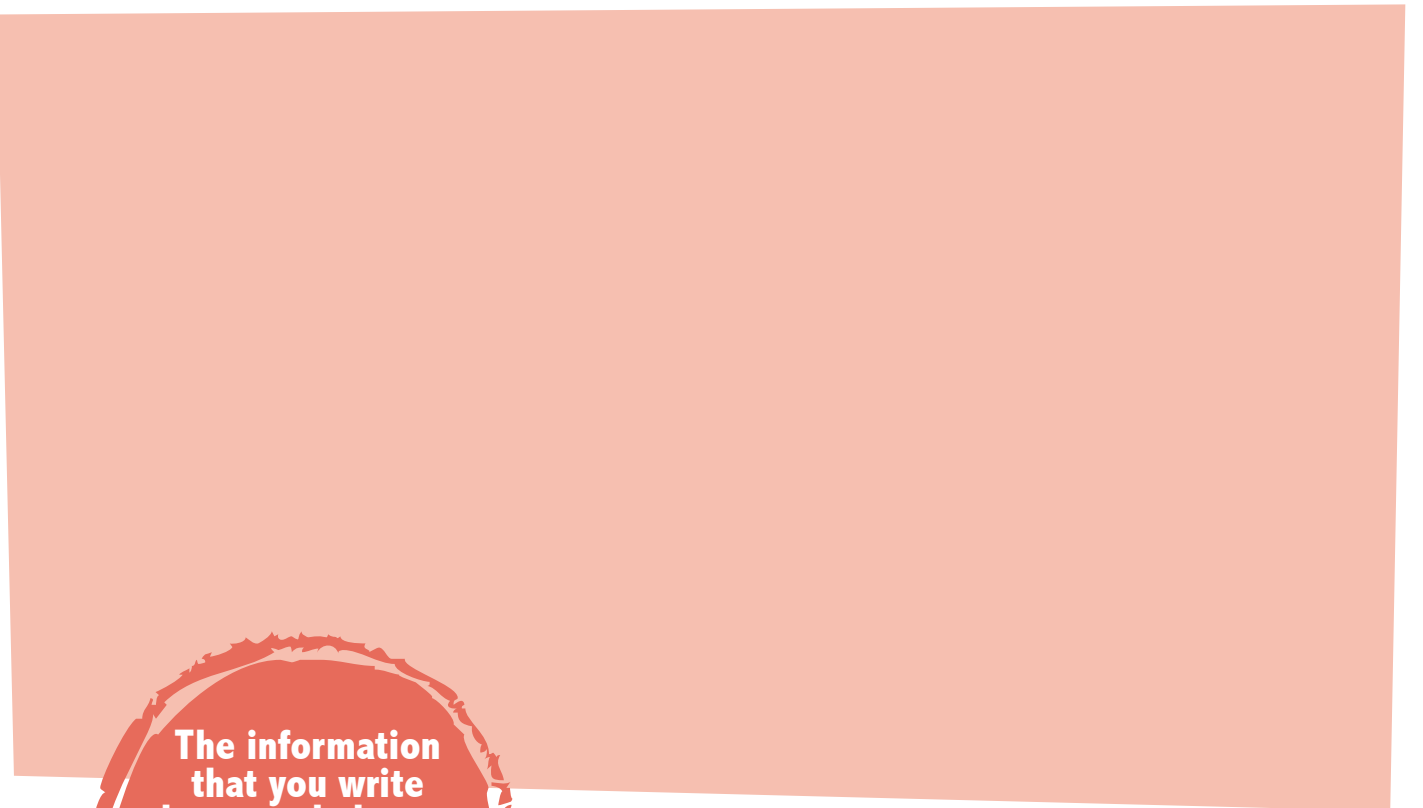
The information from this page can go under Criteria 6

How did you get where you are today?

Tell us about yourself; tell us what you are proud of, like family or past work. Tell us who was in your life in the past? Tell us about significant events that have shaped you and your life.



Tell us about your health journey.



The information that you write here can help you identify things that are important to you and can go under Criteria 1

Thinking about my health

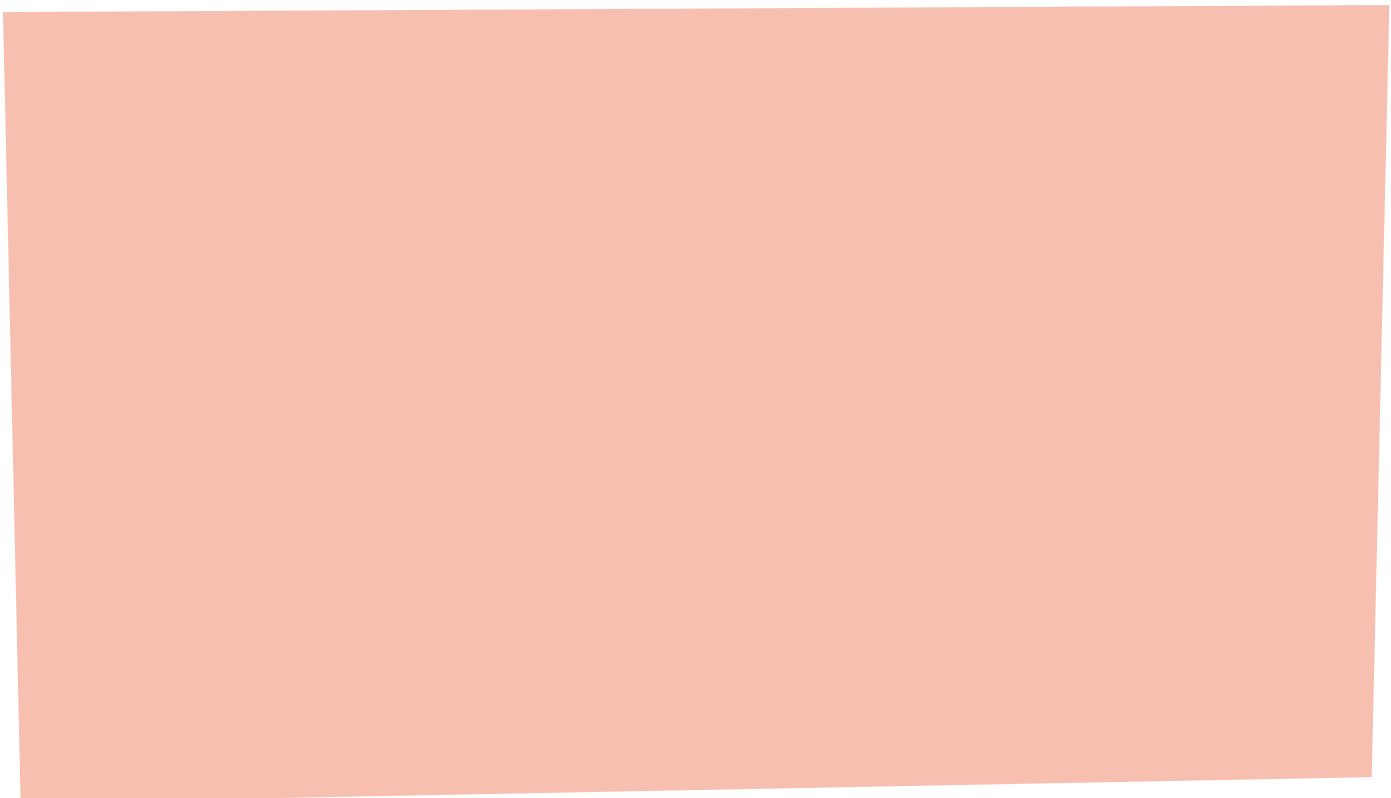
What is my health condition?

Include here information about your current status with your health.



What is my current treatment, care or support with my health condition?

Describe here the current support that you get with your health condition.



Thinking about my health (continued)

How does my condition affect me?

Think here how your condition affects you on a day-to-day basis. Think about physical symptoms, how it affects your independence, side effects of treatment, any family or social issues, and psychological and spiritual issues.

What are my wishes and preferences for my treatment, care and support?

Include here information about your wishes and preferences with regard to your treatment, care and support. e.g. what it would be and where it would be.

What is important to me?

Those things that are important to you are the things that must be present in your life or absent from your life in order for life to be good. This can include people, things you like to do, possessions. One way to identify things that are important to you would be to think about and make a list of what makes a good day and bad day. Look through that list and also look back over the working/not working grid and you will be able to see things that are important to you.

Record them here for now.

About my health condition.

The information
from this section
can be used in
Criteria 1

How I want my life to be

Your plan is a way to change or manage your life, and have a better future. Thinking about your dreams - how you would like your life to be if anything was possible, is a way to set the direction for your planning. You will not be able to achieve your perfect life just through your plan, but you can use this as a guide, to make sure that what you decide in your plan takes you in the direction of your ideal future. Make a list here of the things that would be happening in your life and with your health.

The information
here will help
you in Criteria 1
and 2

Perfect week

'Your perfect week' is a way to think about how you want your life to be in the future and what you would do during the week. Your dreams for the future are a guide; they tell you what you ideally want your life to be like. You can use this information to inform what your perfect week would be like. However you need to think about what is practical and possible, not just ideal. This will then inform the decisions that you make in your plan. This tool is a way to link your dreams with reality. You can then make decisions about how close you can get to this perfect week, in the outcomes and actions for your plan.

Day	What would you be doing?
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

The information here will help you in Criteria 1, 2 and 3

Who am I and what do I bring that can help make the changes I want?

This question is particularly useful for exploring what you as a person have to contribute to the process of thinking about your life and developing your plan. It looks at your gifts, interests, skills passion and spirituality. Additionally it also asks you to think about the material resources you have currently that help you to express who you are and keep you healthy, safe and connected with others i.e. a house, car that is reliable.

Personal Resources

Our gifts are what make us attractive to the other people we meet. Beyond being simply our interests or abilities, they are the parts of us that other people warm to - the parts of us that make people want to spend time with us: our personal Velcro.

Physical Resources

What material resources do you have currently under your control? Do you have technology that you can use to help you in everyday life?

People Resources

Look at the relationship map from the beginning of this book to think about the people who could help you with your life.

**This information
can help you
across your
support plan**

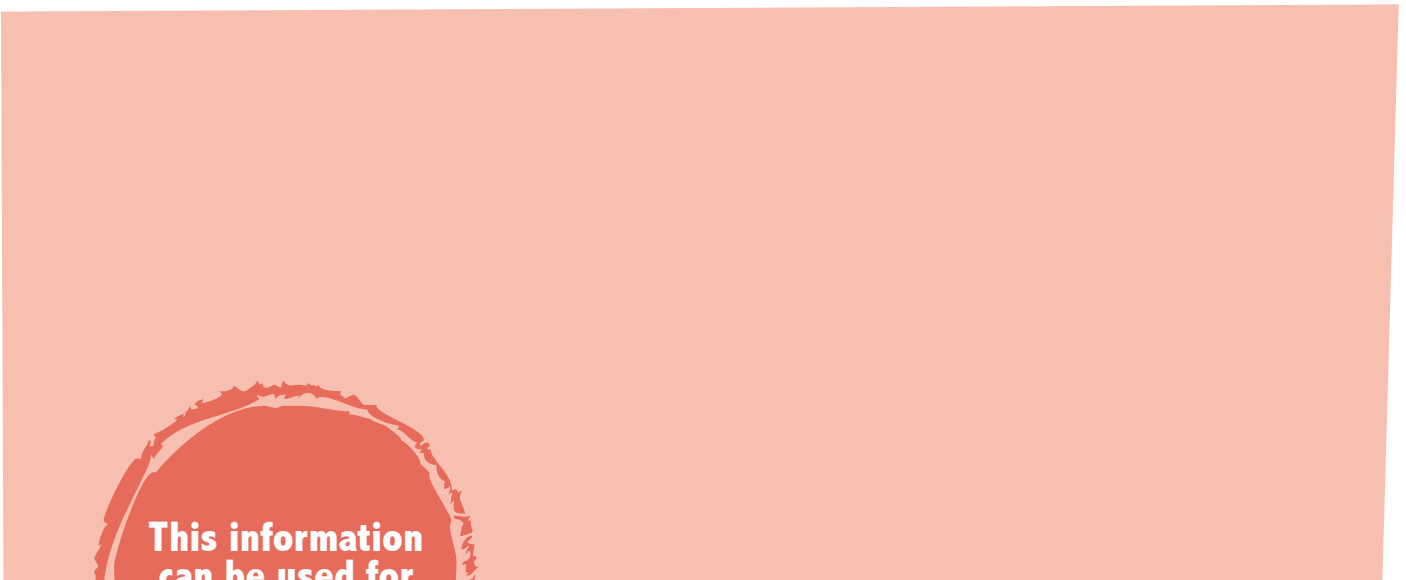
What support do I need to make the changes that I want and to live my life?

When considering any changes you have identified previously, you need to look at what help you may need to make those changes and live the life you want to. Just think about this broadly for now you can develop detailed plans later.

General areas of Support



Support to stay healthy and safe, in particular managing your health condition.



**This information
can be used for
Criteria 3**

Bottom line specifications

Bottom lines are those things that it is essential that you include, plan for or address in your plan. They are the non-negotiable things either because they are important to you, or important for you i.e. keep you healthy and safe. Look back through all the information you have collected so far and identify these bottom lines. Pay particular attention to those things that are important to you, things that are working/not working that you want to maintain or change, issues related to managing your health condition and other areas of your life you need support with.

Make a list below.

**This information
can be used
throughout the
plan**

**This section has useful
tools and exercises
to help you develop
outcomes and then
design what you
support will look like.**

DEVELOPING YOUR PERSONAL HEALTH PLAN



SECTION 2

Thinking about your outcomes

It is important that you use your plan to describe the things you want to change or achieve, and not just the things you are going to use the money to actually buy. These outcomes will then help you decide what support to buy or arrange. It is important that the outcomes that you describe are related to the needs for support you have been assessed for. Personal outcomes are the 'golden thread' that run from your assessment through to your plan and then the review of your plan. Look at the bottom lines that you have just listed and think about an outcome for each of these.

Record these below.

**This information
can be used for
Criteria 2**

Designing your support

Now you have identified your bottom lines and the outcomes you want to achieve, you need to think creatively about what things you might want to buy or arrange to achieve your outcomes.

You need to think “outside the box” and not just focus on what statutory services usually provided for people. It is important to remember that, whilst your personal health plan will be describing how you will be using your personal health budget, it will also need to show what other supports you have in place to help you live your life your way. This may be about the things that your family, friends and neighbours do for you, things you are able to access in your local area or things you can do for yourself, perhaps with the aid of a piece of equipment or technology.

Designing your support also involves some deep thinking about what constraints, or limits, there may be which you cannot control.

- 1 It is important to remember that, whilst we can expect statutory services to help us with our must-haves, there may not be enough resources available for the things that would be great but are not essential. That is why we must think far more widely when planning than just considering what is already available.
- 2 Limits may be things like money, but are more likely to be things like a lack of a particular support or service existing in your area or a lack of knowledge about how to go about finding help.
- 3 Limits are sometimes things we can't change, but usually we just need to think hard about how we can get over them, or use them to our advantage even.

The person helping you develop your plan will help you to think creatively about designing your support. There are a number of techniques you could use to help you think like Blue-sky Thinking or Individual Service Design. Use the space below to record your ideas. You need to take each outcome and think about the support you will need to achieve that and what that support will look like. One solution may support you to achieve a number of different outcomes.

Creative solutions



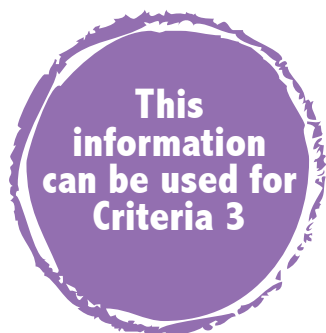
Now you have developed some support solutions you will need to work out the detail of how you will receive that support. The following pages may be useful to use but you don't have to use them.

Timetables

Timetables are a great way of being able to map out your week and where you need support. They are great to include in your plan. Look at the things that are important to you for activities to include. Look at your perfect week for ideas as well. Make sure you also include all areas of support you need, particularly around managing your health condition and staying safe.

Day	Morning (8am-1pm)	Afternoon (1pm-6pm)	Evening (6pm-11pm)
Monday			
paid/unpaid hours?			
Tuesday			
paid/unpaid hours?			
Wednesday			
paid/unpaid hours?			

Day	Morning (8am-1pm)	Afternoon (1pm-6pm)	Evening (6pm-11pm)
Thursday			
paid/unpaid hours?			
Friday			
paid/unpaid hours?			
Saturday			
paid/unpaid hours?			
Sunday			
paid/unpaid hours?			



If you are going to employ somebody to support you the following tools may help you develop person specifications and job descriptions.

What kind of person would you like to support you?

Support wanted or needed	Skills that are needed	Personality characteristics needed	Shared common interests (would be desirable to have)

From the information in columns 2 and 3 you can decide which skills are essential and desirable

Essential	Desirable

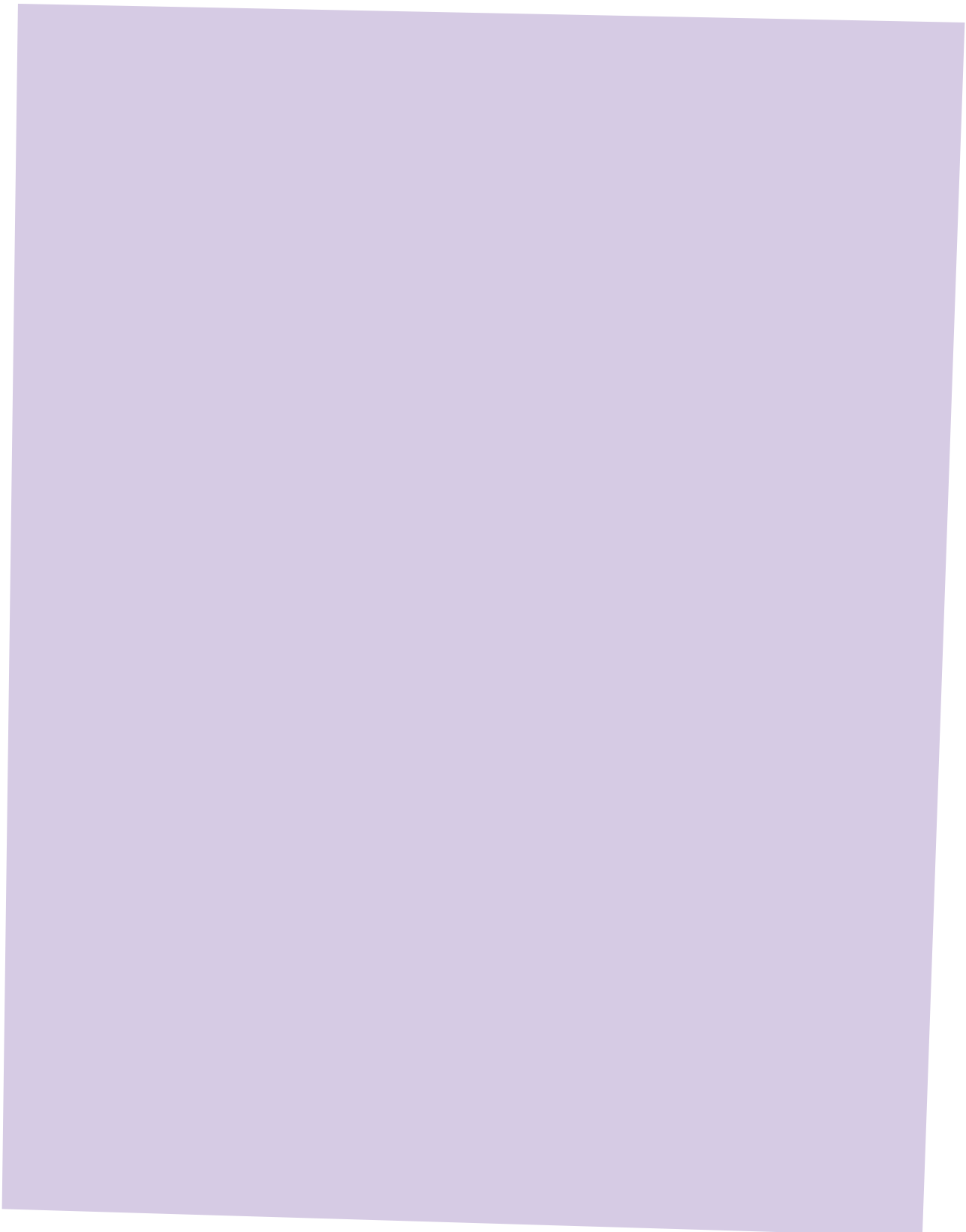
Here is a grid to help you think about job description.

The job title	Main purpose of the job	Who they are directly accountable to?	The main tasks of the job

You can use this information for Criteria 3 and 5

Contingency

What would be your contingency plans, in case there are unexpected events.



How will I spend my money to get the support I want (budget)?

Your plan must show clearly how you are spending your budget. This sheet can help you work out your budget. There are 3 copies in case you want to try different ways.

Money in	Weekly	Yearly
Personal Health Budget. This is your indicative allocation		
Other		
Total money in		
Money out		
Employing staff, day hours, remember to include ancillary costs e.g. Employer's Nat. Ins, holiday pay etc.		
Employing staff, night hours, remember to include ancillary costs e.g. Employer's Nat. Ins, holiday pay etc.		
Agency costs		
Gifts etc for informal supporters		
Other weekly expenditure		
One off payments		
Contingency		
Other		
Total money out		
Do they balance, do you have enough money?		

Money in	Weekly	Yearly
Personal Health Budget. This is your indicative allocation		
Other		
Total money in		
Money out		
Employing staff, day hours, remember to include ancillary costs e.g. Employer's Nat. Ins, holiday pay etc.		
Employing staff, night hours, remember to include ancillary costs e.g. Employer's Nat. Ins, holiday pay etc.		
Agency costs		
Gifts etc for informal supporters		
Other weekly expenditure		
One off payments		
Contingency		
Other		
Total money out		
Do they balance, do you have enough money?		

Money in	Weekly	Yearly
Personal Health Budget. This is your indicative allocation		
Other		
Total money in		
Money out		
Employing staff, day hours, remember to include ancillary costs e.g. Employer's Nat Ins, holiday pay etc.		
Employing staff, night hours, remember to include ancillary costs e.g. Employer's Nat. Ins, holiday pay etc.		
Agency costs		
Gifts etc for informal supporters		
Other weekly expenditure		
One off payments		
Contingency		
Other		
Total money out		
Do they balance, do you have enough money?		

How will I manage my money?

You will need to include in the plan how your personal health budget will be managed. Listed below are the different ways a budget can be managed.

Notional budget

In this option you understand the amount of funding available to you and contribute to decisions about how the budget is used i.e. agreeing the health care outcomes and how the support should be received. The PCT still commissions services, manages contracts etc. Notional budgets could be an option for individuals who want more choice and control over their healthcare but who do not feel able or willing to manage a budget.

Real budget managed by a third party

In this option your personal health budget is held by a third party, you will need to indicate who the third party is. This maybe a budget holding lead professional, a GP, a Trust or an organisation like a community interest company.

Direct healthcare payment

In this option you or your representative would receive the money directly as a direct payment. This would be paid directly into a separate bank account and you or they would manage it yourselves, including all the purchasing of services. You can get help to do this i.e. payroll services. This option may not currently be available in your area as it is subject to a change in the law.

You need to choose which way(s) work best for you and make sure that this is clearly identified in your plan under Criteria 5

**DEVELOPING
YOUR
PERSONAL
HEALTH PLAN**



SECTION 3

Putting it all together

The following pages are where you can put together all the information you have gathered so far. The pages are set out to match the 7 criteria required for a good personal health plan. You could print off these pages to hand in as your personal health plan, personalising it to suit you.

Personal Health Plans can be written in different ways. They may be short or long - with pictures or just text what ever suits you, however they must meet the 7 criteria. For more detailed information about the criteria, please read the document '7 Criteria for a Good Personal Health Plan'.

What is important to you and what is important for you

If someone reads the plan, they should get a good sense of your lifestyle. They should get an understanding of who you are, and your interests and hopes for the future. They should also be able to read clinical information about diagnosis and treatment/care options for your health condition and the impact it has on your lifestyle and quality of life. Look at the information you have collected at the front of this workbook under the important to me section, the health section and the support section.

Record that information here.

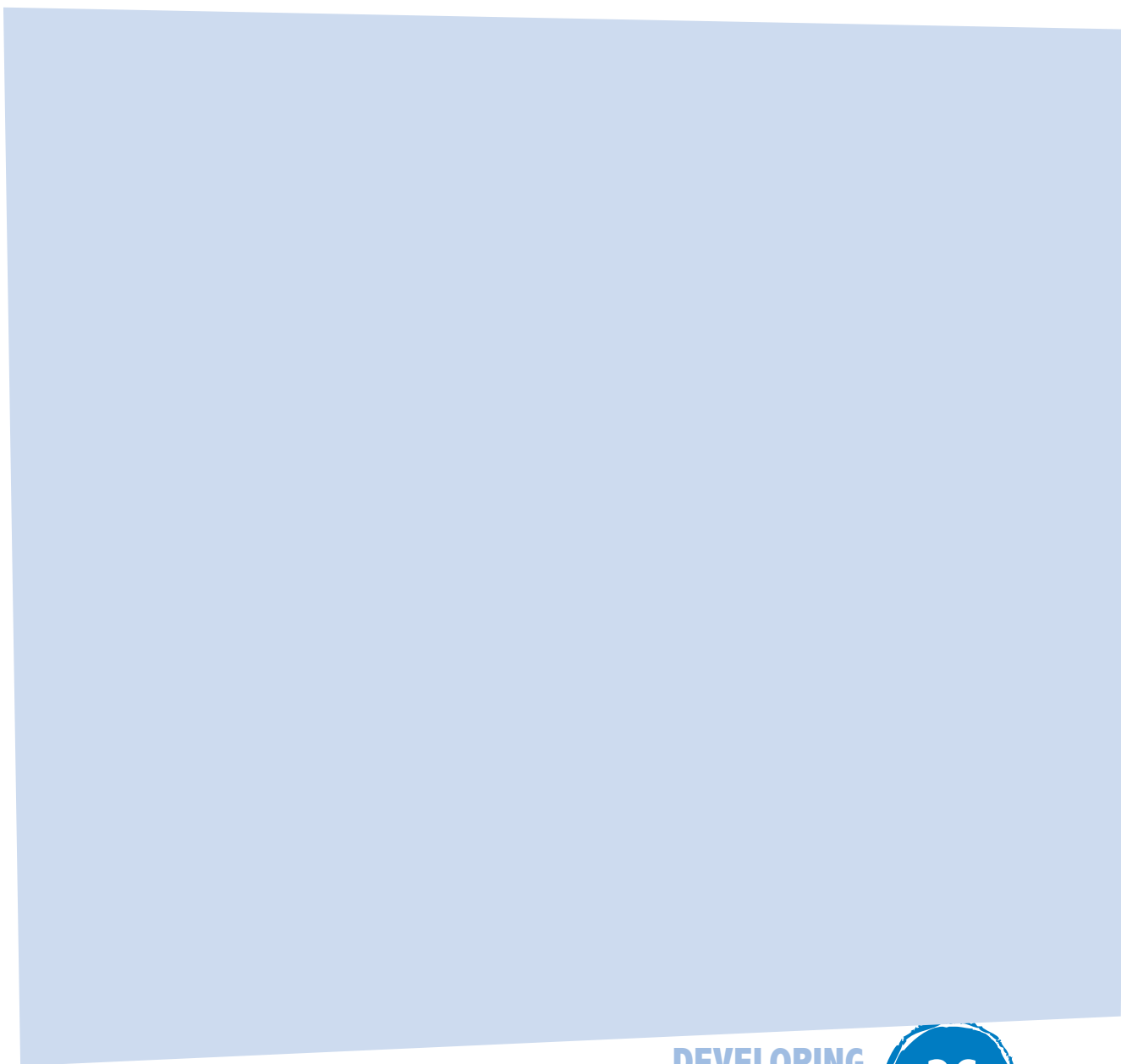


What is working well, that you want to maintain and what is not working well, that you want to change?

The plan should describe what is working well about your life and health condition and that you want to maintain and what is not working well and you want to change.

The plan should describe clearly the outcomes you wish to achieve with these plans.

Look at the information you have collected so far, particularly the information from the outcomes section and record it here.



How will you be supported to live your chosen lifestyle and manage your health condition?

The plan should describe what is needed to support you with the above. It should tell us:

- **What support you need.**
- **Where you need that support.**
- **When you need support.**
- **Who will give you that support.**

It should indicate how to support your health and safety.

It should identify any risks that there may be to you and how these risks will be managed.

It should describe support to help you stay well and also the support you need when you are unwell or when your health condition is worse.

You need to include here all the plans for support you have made so far. You can include your timetables.

How will your Personal Health Budget be spent?

The plan must set out how you are going to use your Personal Health Budget.

The money allocated will be for a year and you must show how this annual allocation will be spent to get the support you have outlined in the plan.

It must also indicate how the budget will be received and managed. You could include here the budget sheet you have already worked on.

How will your support, treatment or care be organised and managed?

The plan will must describe how your support, treatment or care will be organised and managed. It must describe the following:

- **Your role in this.**
- **The role others may take.**
- **How you will comply with any legal requirements i.e. employment law.**
- **Practical arrangements.**
- **Managing well/ unwell plans.**
- **Risks and review.**
- **Training issues - Continued Professional Development.**

How will you ensure you stay in control of your decision-making?

The plan must describe how you will stay in control of your decision-making. It should show:

- **How you make decisions.**
- **How information should be presented to you.**
- **When your capacity for decision-making maybe affected and how that is supported.**
- **Advanced care plans/ directives where appropriate.**

You could include here the two decision-making tools you have completed previously.

What will you do to make this happen (action planning)?

The plan should set out real and measurable things that will happen in the future. In that way, it is possible to look back and see whether the plan is working or not.

The plan should say who will be responsible for each action and when it will be done. The plan should say how you will check your action plan to ensure that problems can be dealt with as they arise.

It should be clear how these actions will help you to make the changes that you said you wanted to make.

Acknowledgements

This workbook has been developed by Jo Harvey of Helen Sanderson Associates as part of the West Midlands Strategic Health Authorities investing for health Personal Health Budget project. It was developed in conjunction with the members of the Support Planning and Frameworks Work Stream:

Neil Bucktin

Leslyn Rew

Jay Dobson

Michael Glynn

Manjula Patel

With support from the design team:

Richard Mendelsohn

Grace Roberts

Harbajan Dhanda

Debbie Robinson

Debbie Curless

Julia Winter

