



# Individual Planning Policy and Procedures

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"I have a right to have my individual needs and preferences to be met and for them to be included in goal planning to meet my aspirations." – client voice

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## Introduction

Play Grow Flourish is committed to pursuing the rights and principles of equality, independence, choice, and inclusion that underpin a person-centred philosophy. The individual planning process is a person centred and inclusive approach to support clients to develop and maintain their skills and capacity and to have a lifestyle based on their interests and aspirations.

## Scope

This policy applies to management as well as staff who are involved in the planning of client supports.

## Principles

Goal Planning is an important component of Play Grow Flourish's support process to ensure that each client can achieve success in their chosen activities. The "About Me and My Supports" is a holistic and collaborative process that explores clients' aspirations and defines their chosen activities. My goal plans are developed based on the information sourced from the About Me and My Supports component of the form, whilst identifying individual client risk. My goal plans are reviewed on a regular basis to monitor outcomes as well as review and manage any risks.

## Policy

Individual planning and review processes aim to support people to move toward an increasing positive lifestyle through enhancing decision-making opportunities and facilitating social integration, participation, and inclusion in the community. The planning process also provides information to maintain safety and continuity of support in the event of natural disaster.

The "About me and My Supports" provides information about all plans associated with the care of the client as well as a guide to supporting client needs and personal preferences. This includes where relevant:

- My Safety Plan
- My Goal Plan that includes personal goals and health-related goals (including goal activity risk assessment) included in the About Me and My Supports Form
- Mealtime Management Plan



- Behaviour Support Plan

All clients are provided with a copy of the plans and relevant staff are familiarised and have ongoing access to them, as a support referral point.

## Procedure

### Intake of new clients

The intake procedure provides the basis for all planning (see Intake and Transition Policy and Procedure) and serves as the "About Me" component of the "About me and My Supports". The About me and My Supports Form provides information about the client and indicates further planning requirements. The following steps must be followed when conducting individual planning for clients:

1. Review the incoming transition form to identify previous supports and transition plan.
2. Review the About Me and My Supports Form and ensure all plans that are identified as required are included in the client's file.
3. Conduct a "My Safety Assessment" – risk assessment, including determining if the client is reliant on the service for their daily needs.
4. Considering the plans that have been identified as required in the about me and my supports, commence the goal planning process including any health goals that have been identified. Goal Planning is conducted in collaboration with the client, inviting them to include an advocate in the process.
5. Support the client with access to current and accessible information about appropriate and accessible resources and services to help them make informed decisions and choices.
6. Identify risks associated with goals and develop management strategies to mitigate the impact of the risk. Risks are reviewed regularly to ensure effectiveness. Explain the risks and consequences in the choices being considered to the client/ their support network and incorporate any safety planning if relevant.
7. Incorporate flexibility into the planning, development, and review steps to capture the ongoing changing needs of clients and their families/carers, including their health needs, sexuality, and self-protection requirements.
8. On completion, ask client if they would like a copy of the About Me and My Supports Form, My goal plan, and Emergency Plan. Once this has been provided to them, ask them (or their staff member) to sign to acknowledge offer of the copy or receipt.
9. Enquire with client if they would like the goal planning documents shared with family, support network or other providers. If yes, the consent form must be signed.
10. Where appropriate and with the client's consent, develop and maintain linkages through collaboration with other providers by sharing information to help meet the client's needs.
11. Adjust the support delivery in a reasonable way by continuously monitoring to ensure it is fit for purpose and the client's health, privacy, quality of life and independence is supported.



12. The individual planning documents are shared with all Play Grow Flourish staff who are involved in the clients supports. This includes ensuring each staff member is trained to respond to emergencies, including how to distinguish between urgent, and non-urgent health situations.
13. All plans and risk assessments are reviewed annually, or sooner if the client circumstances change, or they request an update.

### Planning Process

#### [About Me and My Supports \(Mandatory Inclusion\)](#)

The About Me and My Supports includes identification of:

- Contact details.
- Likes/dislikes.
- Living arrangement
- Daily routines
- Cultural background
- Support network.
- Health and check-up review
- Mealtime support needs
- Medication support needs
- Specialised support requirements

#### [My Goal Plan \(Mandatory Inclusion\)](#)

My Goal Plans are developed in collaboration with the client and with the clients consent their support network. My Goal Plans must:

- Be reflective of the NDIS goals however not a replication. NDIS Goals are used to provide broad direction to goal planning activities. Play Grow Flourish will further draw down on this and develop it into meaningful activities.
- Be in line with the clients wants, needs and preferences.
- Include health goal plans where identified as required in the intake and assessment process.
- Include a risk assessment of the goal planning activities.
- Include review timeframe (minimum annually)

#### [My Safety Assessment \(Mandatory Inclusion\)](#)

Identifies the clients:

- Vulnerability to violence, abuse, neglect, exploitation, and discrimination – refer to Prevention of Violence, Abuse, Neglect, Exploitation and Discrimination Policy and Procedure



- Vulnerability to danger of lack of support in the event of a natural disaster or emergency- Refer to Emergency Management Policy and Procedure
- Extent to which the health and safety of client would be affected if services were disrupted.
- Physical, medical, and verbal conditions that impact the client's susceptibility to danger.

### [My Communication Plan \(where relevant\)](#)

Where the client has specific communication needs, the Communication Plan provides guidance to staff to ensure they are aware of, and able to communicate in the most appropriate and effective method.

This may include:

- Communication aids
- Specific gestures
- Interpreter services
- Written communication
- Other

### [Medication Documentation \(where relevant\)](#)

Where a client has identified they require medication management support, a medication consent form and Medication Summary from their GP will be requested. This information must be no more than 3 months old *Refer to Medication Management Policy and Procedure.*

### [My Mealtime Plan \(Where relevant\)](#)

Where swallowing challenges are identified in the My Safety Planning Assessment or About Me and My Supports form, a mealtime assessment will be undertaken by appropriately qualified health practitioners and staff will receive training in each individual plan. *Refer to Mealtime Management Policy and Procedure*

### [My Behaviour Support Plan \(Where relevant\)](#)

Where Behaviour Support needs have been identified that includes a regulated restrictive practice, a registered NDIS Specialist Behaviour Support Practitioner must develop an appropriate Plan. *Refer to Behaviour Support Implementation Policy.*

### [My Emergency Management Plan \(Mandatory Inclusion where the client has deemed themselves as reliant on Play Grow Flourish for daily needs\)](#)

Each client is assessed for vulnerability and reliance of Play Grow Flourish for their daily needs in the My Safety Assessment in case of a natural disaster or emergency. *See also Emergency Management Policy and Procedure.*





The Emergency Management Plan outlines the following:

- Emergency contact details and formal and informal supports
- Protocols for each client about how to respond to medical emergencies for them
- Systems for escalation in an emergency (both medical emergency and disaster management emergencies)
- How services and supports may be affected in emergency or disasters
- General information regarding Play Grow Flourish' emergency and disaster management plan

### Progress notes

Staff must record progress notes each time they provide support to a client. Progress notes should reflect a client's progress towards their goals and record the events that occurred each time they received support, including any out of the ordinary events.

### Safe Environment

Play Grow Flourish is committed to maintaining high Safety Standards through:

- Ensuring clients are familiar with their Support Team by undertaking a "meet and greet" process and ensuring a match prior to ongoing visits.
- Where a client is working with other providers, Play Grow Flourish will seek consent to work collaboratively with the network to identify and manage client risks and to correctly interpret their needs and preferences.
- The communication plan provides a process for clients to express any emerging safety or health related concerns to their support team
- The Emergency Plan provides escalation information to staff (see Emergency Planning)
- Each staff member has training (including refresher training), in infection prevention controls standard precautions including hygiene practices, respiratory hygiene and cough etiquette *See also infection control policy and procedure*
- Infection prevention and control standard precautions are implemented throughout all settings.
- Each staff member who provides supports directly to clients undertakes training (including refresher training) in the use of Personal Protective Equipment (PPE)
- Personal Protective Equipment (PPE) is available to each staff member, and each client who requires it.

### Planning Principles

#### Person at the centre

Clients are central to planning and decision-making to achieve their preferred lifestyle. The client chooses the level of participation in planning according to her or his preference and ability and is encouraged and supported to have as much control as possible over the whole planning process.



### Considering culture

Planning takes into consideration the culture, language, religious beliefs, and priorities of all people. Planning with a client is undertaken about social customs and traditions and the individual's own culture and beliefs.

### Inclusion of others

In accordance with the person's wishes and consent, their personal support networks and other supporting service providers are actively included in the planning and review process. The inclusion of others in the support planning process aims to encourage the ongoing involvement in the person's life, and to encourage and assist growth of the client's networks and community engagement.

### Personal priorities and strengths

Intake processes include the identification of the persons strengths, including their personal networks and interests. This information is utilised to develop a capacity building approach and instil confidence in the self-delivery of the plan.

### Dignity of risk

Each client's right to the dignity of risk in decision making is supported. When needed, each client is supported to make informed choices about the benefits and risks of the options being considered.

### Continuous process

Planning with the person at the centre is a continuous process of listening, learning and further action and is not a one-off event. Person-centred planning assumes that people with disability have futures, and that their aspirations will change and grow with their experiences.

### Consultation

Play Grow Flourish operates within a learning culture and supports that each person is the expert in their own lives. Whilst the policy draws on the expertise within Play Grow Flourish, the policy will evolve with consultation with staff, clients and their families, carers, and advocates.

## **Training**

All staff are trained in intake, assessment, goal planning, review, and risk management processes as part of the induction.



### Responsibilities

For the purpose of this policy, the Management Team includes the Director, Executive Team Leader and Human Resources Manager.

#### Management is responsible for:

- Approving and monitoring the implementation of this policy and recording any changes within the Policy Version Control Register.
- Ensuring all staff are provided with training in client goal planning and risk assessment processes.
- Ensuring Risk Assessments are undertaken and reviewed, as necessary.
- Reviewing individual planning practices annually or following feedback, complaints, or legislative changes.
- Ensuring systems are in place to support person-centred planning, including cultural safety and supported decision making.

#### Shift Managers are responsible for:

- Reviewing Intake practices for consistency with the policy and procedure
- Ensuring all staff are privy to my goal plans and support plans of each individual of which they are supporting.
- Ensuring consistency between client needs and associated plans.
- Ensuring all intake and planning processes are undertaken with clients in line with this policy and procedure.
- Supporting staff in recognising when a client's plan may require review due to a change in behaviour, goals or support needs.
- Overseeing that family/guardian input is sought and respected where appropriate.

#### Staff are responsible for:

- Ensuring activities that are undertaken are in line with the individual's my goal plan.
- Monitoring the risks associated with My goal plan activities.
- Ensuring Progress notes reflect the clients' activities and any other observations.
- Actively engaging the client in setting, reviewing and adjusting their goals.
- Notifying the shift manager if a clients support needs or circumstances have changed.
- Respecting client preferences, cultural needs and decision-making capacity supporting planning discussions.

### Related policies and documents

- Client Welcome Pack



- Complaints and Feedback Policy and Procedure
- Behaviour Support Policy and Procedure
- Emergency Management Policy and Procedure
- Intake and Transition Policy and Procedure
- Medication Management Policy and Procedure
- Privacy and Confidentiality Policy and Procedure
- Informed Decision-Making Policy and Procedure







### Review

Play Grow Flourish will review each policy through internal audit processes, client feedback or as contextual drivers determine the need for a review.

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Review Date:	Version No:	Approved By:	Amendments:
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