

(SAMPLE) INDIVIDUAL PROGRAM PLAN FOR MONICA (DRAFT)

Legal Name: Monica Smith
UCI Number: 9999999
Date of Birth: 4/22/1959
Meeting Date: 4/5/2024
Next Review Date: 4/4/2025

Type of Plan:

Initial, Annual, Biennial, Triennial

Amendment: [Select a reason]

INTRODUCTION

Things people should know about me:

I am focused on my health and staying active as I prepare to retire from work! I enjoy singing in my church choir. I am very close with my sister Rosalie.

What people like and admire about me:

I have the best smile and laugh! I am a good friend, great listener and am always willing to help my coworkers. My friends always say how dependable I am, and describe me as someone who loves to laugh, crack jokes, and brighten people's day.

Successes I want others to know about:

I am a proud dog mom! I rescued my dog Pepper, with help from my sister. I look forward to spending more time with Pepper. I have worked the same job for 15 years and am proud to say I am ready to retire.

HOW THIS PLAN WAS DEVELOPED

Where did my meeting happen?

My meeting was held in my apartment, as I requested.

What part did I choose to play in making my plan?

I took charge in making the decisions in this plan. I selected the date and the time of the meeting so my sister could join. I invited my support staff and my sister because I want to be sure my team was included to help plan my finances and support me in an active lifestyle when I retire.

Who also helped with my plan?

My sister Rosalie, Joan (my independent living staff), and Jake (my job coach). Carla, my service coordinator, also supported in planning.

VISION FOR THE FUTURE

My short and long-term visions:

I am getting ready to retire by the end of the year and have been working closely with my Independent Living Service (ILS) staff to help with my budget and spending so I can feel confident in managing my own finances. I want to better understand my budget before I retire. My sister, Rosalie, helps me research local community centers and senior centers for activities where I can spend time and meet new people. I would also like to find volunteer opportunities and find a dog park I can bring Pepper to so we can both stay active.

COMMUNICATION

How I communicate with others:

I communicate my wants, needs and desires to others. People I am closest with understand me the best. When I am tired, I rely on my support team to help others understand my speech.

Important things you should know about how to communicate with me:

I love to talk with others. I will talk with anyone, about almost any subject; if you don't understand something I say, politely ask me to repeat it. I prefer phone calls or using Facetime over texting. If you do text me, I may not reply or may use one or two words to answer. Call me instead.

DECISION-MAKING

In the following areas, I need help making decisions:

I make my own decisions. I appreciate getting my family's opinion on big decisions related to my finances, where I live, and if I have a big health care decision to make. I do sometimes rely on other people to explain any contracts or formal legal documents I may need to sign. And I rely on my family or ILS staff to explain medical information with me.

The people who assist me with decisions are:

I am close to my brother and sister. My sister Rosalie lives close by, and she is happy to help me make decisions.

Employment

What is the desired outcome(s)?

I would like to retire from my job by the end of year!

What is currently happening?

I have been working at Sunrise Grocery for the past 15 years. As I get closer to retirement age, I have started working part time in the past year. I am ready to retire and have enough work credits to do so.

What is important to me?

It's important to me to give a proper goodbye to my coworkers and customers I have known for so long.

What is important for me?

It's important for me to transition to my new stage in life having the support from those around me and continuing to have a valued role in my community.

What needs to be done?

- 1) My job coach will work with me and Sunrise Grocery's Human Resources Department to discuss steps needed to retire from work. Job coach will help me plan my goodbye to my coworkers.
- 2) ILS staff will coordinate with me and my job coach to be sure the necessary paperwork is submitted to social security upon retirement.
- 3) Rosalie and I will research places in my community where I can spend time and meet new people, and also research volunteer opportunities where I can give back to my community. We will communicate with ILS and service coordinator if additional supports are needed in doing this.
- 4) Starting November 1, the employment provider and Rosalie will help me to identify any needs as I transition to retirement.

Community Participation

What is the desired outcome(s)?

I would like to have a place where I can volunteer and spend my time and stay connected to my community while meeting new people after I retire. I would also like to spend more time with my dog Pepper at a local dog park.

What is currently happening?

I am currently transitioning from work to retirement. My sister Rosalie started the initial review of community and volunteer options but has not had a chance to dive in completely. I would like to focus on retirement and once my time is freed up, I will also research more options in my community.

What is important to me?

It's important to me to stay active and volunteer at a shelter or senior center in my community once I am retired. I like to be helpful and love meeting new people. I want to spend more time with Pepper being active as well.

What is important for me?

It's important for me to establish connections in places where I know someone; this helps me feel comfortable and safe.

What needs to be done?

- 1) My sister and I will explore and visit several community centers and other locations where I could possibly spend time in the future.
- 2) If additional supports are needed to research and secure volunteer options, the team will discuss at the next planning team meeting. My family and I will connect in three months to review progress. If the team would like to connect sooner, I will reach out to request a meeting.

Healthcare/Wellness

What is the desired outcome(s)?

I would like to stay healthy and active. In doing so, I would like to take cooking classes and learn how to make healthy meals.

What is currently happening?

I had a recent emergency room visit and was prescribed additional medications for my chronic medical conditions. In my follow up visit with my primary physician, I was told my lab tests were not improving, and it was recommended I see a nutritionist. I have agreed to take the additional medications and want to wait to see the nutritionist until after I have retired, when I will have more time for additional appointments. I want to cut back on eating late night snacks and reduce my sugar intake.

What is important to me?

It's important I feel respected and supported in my health journey.

What is important for me?

It's important for me to learn how healthy eating can play a positive role in my health and help me stay active.

What needs to be done?

- 1) I will work with my ILS staff to meal prep each week. This includes creative ways to stay engaged in cooking and excited about healthy meal options.
- 2) ILS staff will help me eat from the list of foods provided by my doctor. My ILS staff will help me schedule an appointment with the nutritionist and support me to understand my new dietary needs.
- 3) Family will assist me to research cooking classes we can take together.
- 4) My Service Coordinator will send a referral for a nutritionist to my Health Care Management Plan Case Coordinator. My Service Coordinator will follow up with me and the Case Coordinator about any additional information that is needed.
- 5) My Service Coordinator will send a referral for CalFresh and will assist me with providing any information needed to access the program. ILS staff will assist me with completing the CalFresh application.

Home Life and Housing

What is the desired outcome(s)?

I would like to continue living in my apartment with my roommate and would like to improve my budget so I can live comfortably in retirement.

What is currently happening?

I enjoy living in my apartment complex. I am very social and like many of my neighbors. My apartment is close to a shopping center where I can easily walk over with my roommate or friends. ILS staff help me budget my weekly bills to pay them on time and help me understand how much money is left over to pay for other items.

What is important to me?

It's important to me to maintain my independence and continue living in my own apartment.

What is important for me?

It's important for me to budget so I can afford my apartment and living expenses.

What needs to be done?

- 1) I will meet weekly with ILS staff for support in reviewing my budget.
- 2) ILS staff will help me maintain a monthly ledger to track my spending and expenses and help me budget.
- 3) ILS staff will assist me to access and maintain services and supports available to me to enjoy retirement: CalFresh, Section 8 housing, Medi-Cal and Social Security Income.
- 4) Service Coordinator will follow up with me every year to review my needs, services and supports.

EMERGENCY PLANNING

What is the emergency preparedness plan for me?

I work with my ILS staff to review my emergency evacuation plan every three months. I keep some emergency supplies which include extra food, a first aid kit, a flashlight, and a list of current medications. Since adopting Pepper, I have added a small bag of dog food, extra water, and an extra leash to my emergency supply list.

Who should be contacted in case of an emergency?

My emergency contact is my sister Rosalie. My ILS staff, job coach and my service coordinator have Rosalie's contact information.

Important things to know and do to support me in an emergency.

I take medications daily for several chronic medical conditions. In the event of an emergency, it is important to make sure I have packed my medications. I prefer someone I know well to check in on me and help me to move to a safe place. My sister Rosalie and I have agreed I will go to her house if a natural disaster occurs.