

Patient Advocacy Bootcamp

LESSON 5

How to Create and Present an Action Plan



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How to Create and Present an Action Plan

Learning Objectives

After completing this lesson, you should be able to:

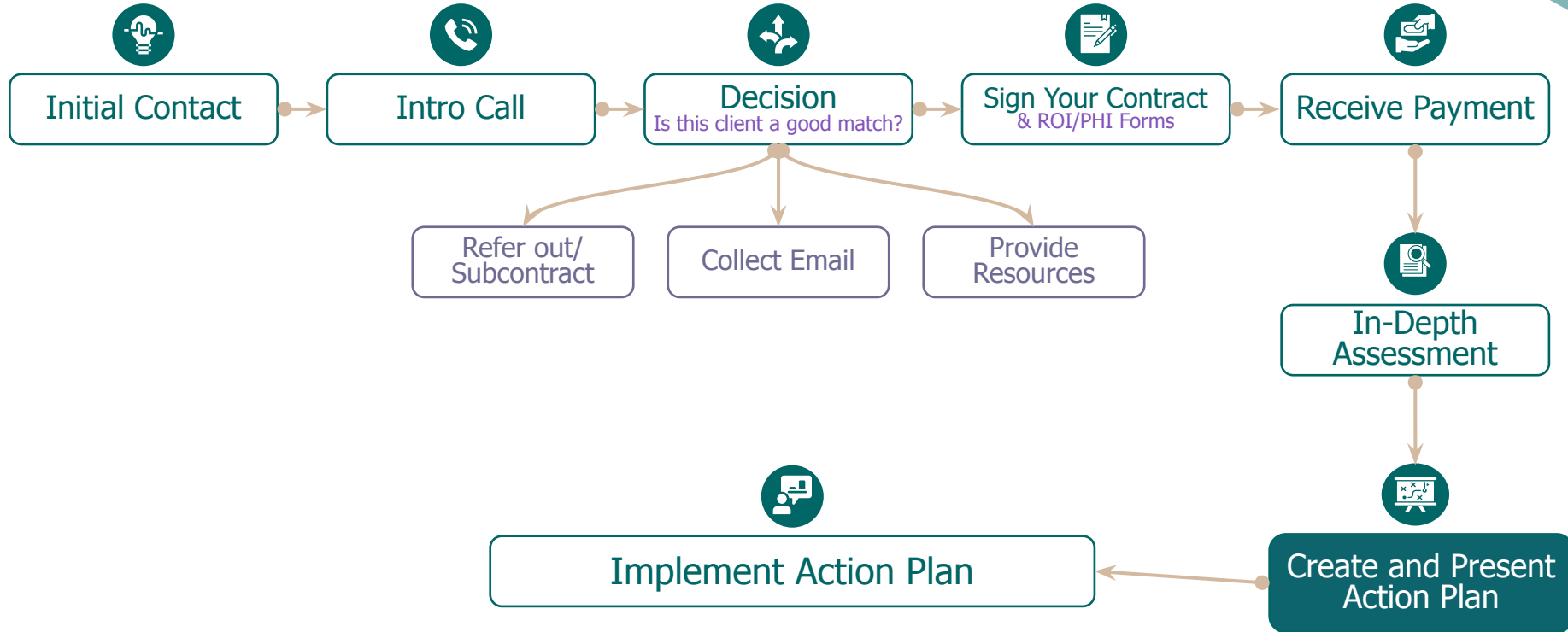
- Define high-level steps in advocacy workflow
- Define and communicate the purpose of an Action Plan
- Identify the essential details to be included in an Action Plan
- Develop a written Action Plan
- Identify methods for presenting an Action Plan
- Describe techniques to confirm mutual understanding

All identifying information used in examples and case studies throughout these lessons have been altered to protect privacy.



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Workflow



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What is an Action Plan and What is Its Purpose?

- Personalized living document
- Summarizes goals
- Provides next steps
- Provides estimates
- Identifies potential additional services needed



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Tools You'll Need: Action Plan Template

Included in your Tool Box

- Sample Action Plan template
- Supplement to Action Plan Template (including key elements and examples)



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Creating Advocacy Action Plans

Key Elements (required and optional)

- Name*
- Date of birth*
- Goals identified*
- Steps taken
- Summary of findings
- Next steps*
- Available advocacy services
- Time estimate*
- Acknowledgement statements and signature



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Creating Advocacy Action Plans

Key Elements (required)

- Name*
- Date of birth*
- Goals identified*



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Creating Advocacy Action Plans

Key Elements (optional)

- Steps taken
- Summary of findings



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Creating Advocacy Action Plans

Key Elements (required and optional)

- Next steps*
- Available advocacy services



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Creating Advocacy Action Plans

Key Elements (required and optional)

- Time estimate*
- Acknowledgement statements and signature



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Creating Advocacy Action Plans

How to determine which key elements to include?

- Professional preference
- Type of advocacy
 - Long term
 - Short term
 - Project
- Level of advocacy
 - Self-advocacy / Education
 - High acuity



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How to Present an Action Plan

Guidelines to a successful presentation

- In person or virtual
- Key people are included
- Provide copies
 - Beforehand vs. at the time of meeting
- Review each key element
 - Answer questions
 - Assess understanding
 - Set clear expectations



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How to Present an Action Plan

- Present each key element
 - Name*
 - Date of birth*
 - Goals identified*
 - Steps taken
 - Summary of findings
 - Next Steps*
 - Available advocacy services
 - Time estimate*
 - Acknowledgment statements and signature
- Answer questions
- Assess understanding



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Client Decision: Accept, Review, Modify, or Decline

Possible outcomes

- Immediately accept
- Time needed to review
- Opt to decline
- Request to modify



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Client Decision: Modifications

Types of modifications

- Identifying new goals
- Re-organizing priorities
- Approving additional services
- Setting limits related to time and cost



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CASE STUDY

Sandy is an 81 y/o woman who never married and has no children. Her niece and nephew have newly activated Power of Attorney (POA).

- Her newly activated POA lives out of state
- Has dementia with anxiety
- Has alcohol dependency
- Moved into independent living facility
- Lost access to transportation
- Exhibits behavioral issues and has conflicts with facility staff

*All identifying information has been altered to protect privacy.



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DISCUSSION / Q&A



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LESSON QUIZ

This assessment is a review of

- What is the purpose of an Action Plan
- How to develop a written Action Plan
- Key elements (required and optional) of an Action Plan
- How to present an Action Plan
- How to confirm mutual understanding



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