

Planning services and coaching at The Arc Minnesota

What is coaching?

The Arc Minnesota's Planning Services can help people, families, and networks find clarity and direction through coaching. Planning Specialists (employed by The Arc Minnesota) use their ability to listen, ask questions, and use planning tools and resources to help the person and/or team clarify what is important to them. Through coaching, the individual and/or team helps create a plan to move toward a life they want.

There is a cost to using our Planning Services.

Why coaching?

Coaching allows the individual or the team to have more flexibility in the planning process.

- **You decide what you want to focus on.**
- **You decide how much support you want and need.**
- **You decide who you want involved.**
- **You decide how much time and money you want to spend.**
- **You decide what formats work best for you.**

What can I expect from coaching?

Some results of coaching may include:

- Increased knowledge of choices available to you.
- Feeling more comfortable navigating life choices.
- Creative problem solving.

What can I expect from coaching? (continued)

- Accurate and timely information.
- Snapshot of current situation.
- Ideas for the future.

What level of support do we provide?

All of our planning services use the coaching model. We offer a spectrum of support:

- Self-led
 - These are resources with coaching prompts you navigate on your own.
- 1:1 (one-on-one)
 - You are paired with a Planning Specialist to support you in the process.
- Network
 - A Planning Specialist meets with you and a team of your choice.

How is coaching different from person centered planning?

Both coaching and person centered planning operate from the principles of person centered planning; the belief that the person is the expert of their own life.

Coaching follows Minnesota's requirements of person centered planning.

However, coaching allows for different modes of understanding, communication, and relaying information.

Coaching recognizes that words are only one piece of how people may communicate. With coaching we may use art, movement, and music to express the wants and needs of the person.

We may also use components of formal person centered planning depending on the situation and what the individual and their team hope to get out of planning.

What if I want the FutureLife Options™ program?

FutureLife Options is one of the options within coaching. Historically, FutureLife Options included:

- Documenting important details of care.
- Information for who comes after parents and caregivers die.
- Providing resources and information around legal and financial planning.

This program is expanding. Through coaching, families can customize what topics are most important or urgent, what level of support they would like, and what makes the most sense for their family.

What if I want to update my previous planning service documents?

You can choose to review or update your documents or plan at any time and will be given a new cost estimate. Individuals or families are responsible for contacting us if they want to update their documents.

FutureLife Option Annual Reviews will continue as a plan revision. You will now be charged an hourly rate instead of a flat rate. If families want an annual review of their plan, they must contact us.

Whether or not your documents are updated, families can always contact the Help Desk for information and resources.

You can reach the Help Desk by calling 1-866-797-1122.

What can planning specialists do?

Planning Specialists CAN:	Planning Specialists CANNOT:
Facilitate Conversations (one-on-one, families, or with a wider network)	Attend appointments and meetings outside of coaching, ex: annual meetings
Write plans and tools, according to proposal	Create budgets or documents, (IEP, CSSP, etc.)
Listen	Fix structural and systemic gaps and issues
Ask Questions	Change someone's life
Answer questions, or help find the answer!	Make someone (person, provider, staff, etc.) do something
Offer encouragement!	Choose a goal they don't want
Keep schedule and accountability	Make choices for others
Help brainstorm	Act outside of The Arc's values and positions
Share ideas, resources, and use person centered thinking tools	Fill out service/county documents, applications, etc.
Create visuals or other creative solutions for expression	Find housing, programs, services, jobs, etc.

What is the coaching process?

- 1) **Contact us:** If you're interested in learning more about planning services, contact us. You can call the Help Desk at 1-866-797-1122 and ask for planning services. You can also submit an [Ask an Advocate](#) or email us at info@arcminnesota.org.
- 2) **Consultation:** If you are considering planning services, we will set up a free one- hour virtual information session. During this consultation we will discuss what you want from planning.
- 3) **Proposal:** Based on the consultation the Planning Specialist will create a proposal. The proposal will outline included services. It also will include the estimated amount of time and cost.
- 4) **Service Authorization:** After both The Arc Minnesota and the participants sign the proposal, we will discuss payment method(s).
- 5) **Coaching:** Once payment retainer or service agreement is received we will reach out to begin services.
- 6) **Meetings:** When we start coaching, we will meet several times. Most of our meetings will take place over video call (Zoom). Because we are still in the midst of the COVID-19 Pandemic, our priority is the safety of our employees and the people we support. If an in-person meeting is absolutely necessary, we will follow The Arc Minnesota's protocol.
- 7) **Completion:** We recognize that planning is an on-going process. Our services will end when one of the following happens:
 - You decide coaching is no longer needed.
 - We finished everything outlined in the proposal.
 - We run out of time on the proposal and do not receive a new signed service authorization.
 - We don't receive payment by the due date noted on the invoice.
 - You do not contact us for 90 days.
- 8) **Feedback:** We are trying to provide planning services in a different way. Your feedback will be important. After our time working together, we will send a feedback form. We would appreciate you taking the time to fill it out.

If there is feedback on our website or other experiences with our planning services in the past, we would like to get your feedback as well!

Cost

We charge \$100.00 an hour (\$25.00 per 15 minute unit).

- The amount of time will depend on the plan and the need
- Proposals list the budgeted amount of time
- If we think we need more time we will update the proposal
- We will give time usage updates every month
- We will bill out bi-monthly
- We only bill for the time spent (reference breakdown of cost)

Breakdown of cost

- Any and all communication with the individual and/or any of the team members: emails, phone calls, etc.
- Meetings
- Writing documents and tools
- Travel
- Record keeping and research

Time tracking and billing

The Planning Specialist will document all time used

- If using the waiver for payment, the service agreement authorizes the full amount of units in proposal. Your waiver will be billed bi-monthly as these are used.
- If using CDCS:
 - You will be charged a flat rate of \$200 for the non-refundable retainer fee before the planning begins.

Time tracking and billing (continued)

- The Arc Minnesota will bill the fiscal intermediary bi-monthly for time spent.
- Please let us know if you need a different billing schedule.
- If paying cash or credit:
 - You will be charged a flat rate of \$200 for the non-refundable retainer fee before the planning begins.
 - The Arc Minnesota will bill you directly bi-monthly for time spent.

Refunds

We do not provide refunds. We will bill all time used. If you would like support reviewing the agreement before signing, please let us know. We will not continue services if we don't receive funding or an active service agreement.

Waitlist

If we have a waitlist, you have several options. You can choose to:

- Meet with us for a free, one hour consultation. We will share resources and ideas for you to work on while you wait.
- Join the waitlist, without a consultation. We will contact you when there is an opening, and do your consultation then.
- Start on your own with our resources from The Arc  Minnesota.
- Contact another agency to do Person Centered Planning.