

UIC Solutions Suite Webinar Series

Transcript for how-to webinar on *This Is Your Life! Creating Your Self-Directed Life Plan*

Recorded by Jessica Jonikas

Slide 1:

Thank you for visiting the University of Illinois at Chicago's Health & Recovery Solutions Suite. The following recording comes to you from the UIC Center on Integrated Health Care and Self-Directed Recovery. Visit our online Solutions Suite to obtain free tools that promote health, self-direction, and employment for the behavioral health field.

Slide 2:

Hello. My name is Jessica Jonikas. I am the Associate Director of the University of Illinois at Chicago's Center on Integrated Health Care and Self-Directed Recovery. Our Center offers an online Solutions Suite, containing free tools for the behavioral health field. These tools promote wellness, self-direction, and employment for people who are recovering from mental illnesses. You can visit our Solutions Suite on the web site where you found this webinar, at www.center4healthandsdc.org. Today, I'll be discussing how to implement one of the tools found in our Solutions Suite, called *This Is Your Life: Creating Your Self-Directed Life Plan*.

Slide 3:

This tool and the UIC Solutions Suite are jointly funded by the National Institute on Disability, Independent Living, and Rehabilitation Research, of the U.S. Department of Health and Human Services, Administration for Community Living; and by the Center for Mental Health Services of the Substance Abuse and Mental Health Services Administration. The work of the Center does not necessarily represent the policy of any agency or endorsement by the federal government.

Slide 4:

This Is Your Life is a workbook that people use to figure out what they'd like to do in life and how to get there. It is geared specifically to people in recovery from a mental illness, or for those who have found it hard to do certain things in life because of behavioral health issues. Other people have found our workbook to be useful as well, including people managing other disabilities, those moving out of nursing homes into the community, and youth in the year before graduation.

Slide 5:

You may be wondering why the tool focuses on life planning versus treatment planning. We believe that the best way to help people move forward with their mental health recovery is by planning for the kind of life they want to live, not just the kinds of treatment they want or need. Treatment and services are important, but they aren't the only things that people with mental health conditions need. Creating a life of meaning and purpose is a critical part of recovery, and a life planning tool helps people to achieve it.

Slide 6:

This Is Your Life can be used by service providers, peer providers, family, or other supporters to help someone else make a life plan. It also can be used directly by people who want to make their own life plan. This webinar will review the philosophy and contents of our workbook, and how it can be used to support life planning.

Slide 7:

Consider these statements that you might have made yourself, or heard from a client or a peer. “I sure would like to feel happier with my life.” “I’m in a rut, but I don’t know where to start to get out of it.” “I’ve tried to make positive changes in my life, but something always gets in the way.” “I’d be happier doing something else, but I don’t know how to go about figuring it out.”

Slide 8:

These are common feelings for many people, including those in mental health recovery. If you do an Internet search, using the key words “why make a life plan,” you’ll see dozens of web sites to visit on why life planning is so important. For those on the verge of adulthood, life planning often involves thinking about where to go to school, what to major in, where to live, or what kind of career or job would be good. For adults, life planning might happen when there’s a transition, such as changing jobs, moving to a new city, starting a family, getting married or going through a divorce, or needing to care for an elderly parent. Other times, life planning might start with the realization that something isn’t going well and it’s time to make a change.

Slide 9:

Whatever the reason, having a written plan helps people figure out how they see themselves, what they want out of life, their future goals, and their next steps.

Slide 10:

What makes ours different from the other life plans out there? Well, in our work, we kept seeing that many people with emotional problems felt like large parts of their lives were not really their own. They felt defined by having a diagnosis or challenging issues, and that others were worried about their dreaming too big or making plans that would be too stressful. So, they ended up feeling stuck and misunderstood. But, we had a different perspective. We believed that a good life plan is not stressful because it emphasizes setting small goals that build up to larger ones over time. A good life plan also helps people identify not only their needs, but their strengths and assets to build on. For people managing various psychiatric or medical conditions, a good life plan also involves thinking about how to maintain wellness while pursuing life goals. We turned this vision into our workbook, so that people who use mental health services can see that they can set a life goal and reach it, even when they struggle or run into roadblocks.

Slide 11:

You may be wondering why we use the phrase “self-directed” in our life plan. Isn’t it obvious that life plans are directed by oneself? Well, yes and no. For many people with disabilities,

including those with psychiatric disabilities, self-direction can be complicated by symptoms or functional limitations. These individuals, and others in their lives, often come to worry about their skills or their competency to make feasible life plans. In our workbook, we stress that people must be allowed to choose what goals to work on and how to achieve them. They call the shots and set the pace. But, this doesn't mean that they won't have help, because we all need support to succeed and to cope with disappointments. But, the plan is self-directed because it is the creator's plan to make, break, change, or scrap, with plenty of time to mull things over and work up to change over time.

Slide 12:

People often ask us what kinds of goals people set using, *This Is Your Life*. In our experience, common goals include managing a psychiatric or medical condition, getting a job or a better job, going to school, getting more physically fit, recovering from a major loss, finding a new place to live, or developing a friendship. The workbook can be used to set a life goal in any area that you or a client wishes to change or improve. Remember – most life plans are built on a series of smaller goals to reach a larger one. Changes don't have to be made all at once, and sometimes, goals will change as the person changes and grows.

Slide 13:

We've all been there. We make a promise to ourselves that this year will be different. We'll lose weight, we'll exercise, we'll make a friend, we'll get a job – you name it. Most of us mean to follow through, but something bursts our bubble and we don't make the change. There are many reasons for why we give up on a goal. Some of them include: not really being ready for change, trying to do too much too fast, getting discouraged by set-backs, and not taking care of ourselves along the way. Then, when we fail, we feel worse about ourselves and a vicious cycle begins.

Slide 14:

If this sounds familiar for you or your clients, here are a few things to keep in mind.

Slide 15:

First, our workbook emphasizes that we all need to do some challenging things in order to achieve our dreams. For example, someone may know that her living situation is isolating her, but she may also feel scared about moving. Someone may know that he could be more financially secure if he got a job, but he may also worry about losing his public benefits. Someone may need to lose weight, but also may be reluctant to give up various comfort foods. This ambivalence about life change is perfectly normal. People often are of "two minds" when they face a major change. A good life plan helps people realize that doing challenging things when trying something new is a part of the process. At the same time, workbook users are reminded that they can always change their minds about their goals, slow things down or speed things up as they work on them, and take breaks when they're not feeling well.

Slide 16:

The second principle that underlies our workbook is that life change is a process, not a one-time

event. The fact is, set-backs are expected, but this doesn't mean that the goal won't ever be met. Also, sticking with a life plan won't always be hard. Part of the process should include time for relaxing, having fun, and staying connected with others.

Slide 17:

Thirdly, we suggest that an understanding of the Stages of Change Model can be helpful when working on a life plan. In this model, people move along a continuum from not thinking about change, to contemplating it, to preparing for it, to acting on it, and then, to maintaining the change. This means that before being ready to act on goals, some people will need time to think it over, while others will need time to prepare. This doesn't mean that they won't ever change, but it does mean that not everyone is ready to act as soon as they start thinking about change. In fact, this experience is so common that we've included an exercise for workbook users to determine their Stage of Change related to life planning. We assume if they're working through our guide, then users are already thinking about a change. Thus, they can answer questions about whether they're considering a specific one and how quickly they intend to start planning for it.

Slide 18:

If users determine through this exercise that they're in the Stage of *considering* a life change, then they'll focus on gathering information about that change and on weighing the pros and cons of it. Many people stay in this Stage for a long time before they are ready to move into actual planning and action for change. As they are considering change, helpful strategies to move people into the planning Stage include listening to other people's success stories, receiving encouragement from people who have been through a similar change, and receiving more information about various approaches or options they can try.

Slide 19:

If users determine through our workbook exercise that they're in the Stage of *preparing* for change, then they're ready to start defining tasks, as well as finding tools and resources, to support a life change. Family, peers, providers, and other supporters will need to know that they're ready for a change. These supporters can help with the identification of tasks and with finding resources, which will help workbook users to move towards action.

Slide 20:

Once in the *action* Stage, users will benefit from reminders that it's common to try many different things before landing on the best option for one's own situation. Being ready to act does not imply that the person has all the answers. Rather, it means the person is ready to try things, see what works, and retool the life plan accordingly. This is a primary way that someone can move from planning to acting: that is, having the realization that acting doesn't mean getting it just right. Missteps can be used to clarify what is needed, rather than being viewed as a failure. Therefore, it's good for users in this Stage to reward themselves for the small or large steps they take. This will help build confidence for continued progress.

Slide 21:

We recommend a few things to help people get ready to use our workbook. First, we suggest reading the whole thing before writing down any goals or tasks. This will help workbook users get the "big picture" of what they're trying to accomplish through life planning. Again, we

strongly recommend that users choose at least one person to support them in this process. We also recommend that workbook users talk with their providers – both peer and traditional – about how their life plan fits with their treatment plans and other goals. Additionally, it's best for users to set aside time each day to go through the workbook, make plans, and review how things are going. Once goals and tasks become second nature, people often need only a few hours each week to review their plans, self-care strategies, and progress.

Slide 22:

Now let's take a look at each section of our workbook.

Slide 23:

In the first section, the workbook emphasizes that, no matter what a person's goals or stage of change, self-care is key to success. In that spirit, workbook users are taken through a series of pages to answer the following questions. First is defining what they see as their hardest emotional or mental health issues. Second is defining who they believe they are, aside from any diagnosis or special needs. Third is considering what they're doing currently to cope with any mental health problems. And finally, users consider whether there are new self-care strategies that might work for them.

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Importantly, a workbook user might determine that engaging in better self-care is a major life goal right now. We give suggestions about what to do if this is the case. Alternatively, users might determine that their self-care is in good shape, and will be the foundation for their life goals. Either approach is fine, just as long as users are moving towards or maintaining regular self-care.

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The next section of the workbook addresses the importance of having a Circle of Support. Our Circle of Support consists of people who have hope for us, care about what happens to us, advocate for us when we're not feeling well, stick with us, and believe that we can achieve what we want in life. Workbook users go through an exercise to identify exactly who is in their current Circle of Support, including family members, spouses or partners, friends, peers, therapists, doctors, and others.

Slide 26:

As they go through this exercise, workbook users might determine that broadening their Circle of Support is the life goal they'd most like to work on. There are different ways they can go about this, including making plans to join a support group, volunteer in the community, take a course at the local community college, or participate in a sport or a hobby-based group. It helps to keep in mind that making new friends isn't easy for most people, especially as we get older. Workbook users may find that they need to plan very small steps that will lead up to a new friendship or relationship over time.

Slide 27:

Additionally, many people realize that their main or sole source of support is from mental health professionals. That's common, and it can be a good place to start. Over time, these same mental health professionals can assist workbook users in building a broader Circle of Support. For users who already have a solid Circle of Support, it still helps to review who's in it and whether it consistently meets varied support needs.

Slide 28:

With consideration now given to self-care and supporters, it's time for workbook users to consider life planning. The workbook begins with the Contemplation Stage of Change, where users are just starting to think about changing something in their lives. As I mentioned earlier, users will know whether they're in this stage after answering a series of questions that are found in the beginning of the workbook. In this Stage, users are starting to think about goals like making a friend, better managing a health condition, getting a job, or quitting smoking. Remember, at this point, the user is not ready to start making actual plans or to make changes.

Slide 29:

Instead, users in this Stage will benefit most from a series of decisions. First is thinking about what they like and do not like about their lives. Second is considering what they'd most like to work on changing in their lives. Another useful activity in this Stage is deciding what good things will happen if a life change is made, as well as how change might be difficult. There are worksheets to guide users through all of these decisions. Workbook users in this Stage also will benefit from talking to people who've been where they are, to hear what was good and what was hard about making a change in their lives.

Slide 30:

It may feel like people spend too long in this Stage, trying to figure out what to change and the consequences that change will bring. But, that's common. As long as the user isn't in danger from prolonged contemplation, taking it slowly may be the best course to help them choose a life change they can plan for and act on when they're ready.

Slide 31:

The next section of the workbook is devoted to planning for a life change. This is for users who are ready to move forward from contemplating what a change might look like, to making detailed plans for a specific life change. At this stage, users will be figuring out the steps they'll take once they're ready, along with their obstacles to personal success and their resources to support success. Users are not yet ready to do what they're planning. Instead, they should focus their energy on figuring out what they have, what they need, and what types of tools or information would help them to reach their goal someday.

Slide 32:

We've designed a series of worksheets to guide users through all of these planning tasks. The worksheets provide a concrete way to set goals that are specific, measurable, achievable, relevant, and time-limited. This is called a SMART goal.

Slide 33:

The first sheet is for them to write down the goal they're planning for. Next, they'll list on a worksheet the specific tasks to reach their goal. For example, if the goal is to get a job, some of the tasks might be to complete a career profile; pick a desired type of job; hire someone to strengthen a resume; and find a job coach for ongoing support.

Slide 34:

The next worksheet helps users to list the obstacles they will face in meeting their goal. To continue with the example of getting a job, obstacles might be a lack of adequate interview clothes, having a long break in one's employment history, or having past involvement in the criminal justice system. Users are encouraged to use their Circle of Support to plan for how to overcome these barriers, including talking with peers who have overcome similar issues. Next, users complete a worksheet listing the internal and external resources they have to support their goal. For internal resources, they may have determination to succeed, a positive attitude, and a good sense of humor. For external resources, they may have strong family support, a helpful case manager, reliable access to a computer, and some work history in their area of interest. Here, too, users can call upon their Circle of Support for emotional or practical help.

Slide 35:

Our life planning workbook is unique because it encourages users to make a detailed budget as part of planning for a life change. We provide several worksheets to help users assess their current monthly income and expenses. There's also a worksheet for them to list the new expenses or income that might arise from their new goal. Then, they can compare their current financial picture with the budget for their new goal to see where they can make spending changes. This also can help them decide whether to call upon a benefits counselor, or ask for financial assistance with their goal.

Slide 36:

The next section of the workbook is devoted to acting on a life change. This is for users who are ready to put their plans into action and make a life change. At this stage, people are ready to start doing their tasks and recording what happens. This is done with a worksheet to document the exact dates by which they will complete each of the tasks from their planning worksheets. If they find they aren't ready to commit to dates, then they're probably still in the planning stage and aren't ready to move forward. That's okay! It's best to start when truly ready. Also in the action stage, workbook users will decide how to recognize if they've made sufficient progress, or if they need to re-tool their plans or goal.

Slide 37:

Let's talk for a few minutes now about the act of setting target dates for various tasks. We've found that it's best to set dates that allow plenty of time for people to do what's needed. Depending on the life goal, some tasks may take weeks or even months to complete. So, it's good to remember that these dates are not set in stone. The point of the dates is to keep people focused on moving forward. In real life, it's common for people to find that a task takes more time or less time than anticipated. In this case, target dates can be adjusted to reflect how long the task is actually taking. And, this is also why we recommend that users regularly review their plans and adjust them to what's going on in their lives.

Slide 38:

The next section in the workbook is devoted to maintaining change. Most of us can relate to having gone through great effort to make a change, only to slip back into our old ways or routines over time. It's easy to fall off the wagon when making a change. And the best way to deal with this is to plan in advance for how to maintain the successes we've worked so hard to achieve. In the workbook, we recommend a few ways to maintain success. First is to regularly reward oneself for success while learning from mistakes. Second is to stay connected with peers, family, and other supporters. Third is to accept that set-backs are common, and have plans for what to do if things aren't working out. Finally, we also recommend that people write down ways they can find extra support and motivation to maintain their success and build upon it.

Slide 39:

In recognition of how common set-backs are, we provide a worksheet to record 2 people workbook users can call when they've hit a roadblock or are discouraged. They also record 1 thing they will do when they feel like giving up. Having this in writing helps people follow it, even when they're feeling disheartened. It also shows people that set-backs are common enough to plan for them in advance. We want workbook users to know that they're not the only ones who struggle on the path to a dream.

Slide 40:

Finally, our workbook ends with a section on what to do if things aren't working out. When this happens, we recommend that workbook users review their goal with an eye to whether it's still important to them. If the answer is no, then they might want to explore whether that goal wasn't as important to them as they originally thought. Or, sometimes people realize only after working on a goal that it wasn't really for them. This is not considered a failure. Rather, it's a normal part of self-learning. Similarly, it might be that the workbook user has grown or changed, and the original goal may no longer be of interest. That could not be known until the goal was tried. If, however, none of these things are true for why the goal hasn't worked out, then it might be that the person just needs a break. Sometimes, the goal is still important, but other things interfere with progress. Knowing when to put this aside is as important as pushing oneself to succeed. We strongly suggest that, before putting the work aside, users set a future date for when they'll

decide if it's time to start working on their goal again, or time to consider a new goal or a new strategy.

Slide 41:

Our workbook concludes with several pages of resources to support life planning, self-determination, and mental health recovery. Additionally, we recommend that users consider using *This Is Your Life* in conjunction with another UIC Solutions Suite tool called, *Express Yourself: Assessing Self-Determination in Your Life*, which can be found on the web site where you accessed this webinar.

Slide 42:

Thanks for time today. We hope *This Is Your Life* will support you or your clients in the quest for meaning and purpose on the road to recovery. If you still have questions after this webinar, you can request free technical assistance from our Center, which we offer on a time-limited basis. Call us at 312.355.1696 or click the “free technical assistance” button on the web page for *This is Your Life* on our web site.

Slide 43:

Thank you for listening. You can obtain additional Solutions Suite recordings, or download a transcript, by visiting the Center's web site.