Handout 9 – Monitoring and Reviewing Individual Plans

It is crucial to implement strategies that continually monitor the person's progress towards meeting their goals. Monitoring processes need to check that strategies are working, and that the person is satisfied with the service they are receiving. Monitoring also enables the worker to evaluate their role in the process. The strategies described in the individual plan is also regularly reviewed to explore ways of getting over barriers, which have arisen. Individual plans are regularly changed to reflect achievements, new priorities, changing goals or abilities.

Reviews also consider whether resources are being used effectively. This includes staff, equipment, and funding.

Monitoring is often informal and part of the day-to-day contact between the person and support staff. This is when minor changes or adjustments can occur, in collaboration with the person. In addition to this a formal review process is important for checking the progress being made on the support plan.

Good practice in monitoring and review

The principles of good practice in monitoring and review are:

- Each person is provided with opportunities for ongoing assessment and reassessment of their needs. The assessment may involve family, friends and advocates as well as service providers.
- Each person is provided with the opportunity for the monitoring and review of the strategies outlined in their support plan on a regular and timely basis.
- The person is directly involved in the monitoring and review process and is conducted in a way that respects the person’s culture.
- If any action needs to take place as a result of a review, responsibilities need to be allocated to workers and time frames determined to ensure that change occurs.

Developing a monitoring and review process

The key tasks in developing a monitoring and review process may include:

1. Deciding on the frequency of monitoring/reviewing. When the worker and client meet to develop a support plan, an arrangement should be made to monitor progress. The frequency of monitoring and review will depend upon the client’s needs and progress towards meeting goals and will be recorded in the plan.

2. Developing a tool for monitoring/reviewing. Some services may use a review form to review the support plan. An alternative is to make notes on the support plan itself, or make notes in the case notes. Questions to be included on a review checklist may be:

- Have the goals been achieved?
- Have the goals changed?
- Are additional resources required to achieve goals?
- Are different strategies required to achieve goals?
- Should new goals be developed?
• Should the plan be signed off as completed?

All planning processes including review and monitoring need to be included in the organisation's policies and procedures. These will cover such issues as:

• Frequency of monitoring/review sessions
• Client involvement
• Tools to be used
• Privacy and confidentiality of client information
• State Disability Service Standards.

If there is no progress in working through a support plan arrange a review to look at what is happening and make changes to the support plan if necessary. If you are unsure about what needs to happen, talk to the Coordinator.