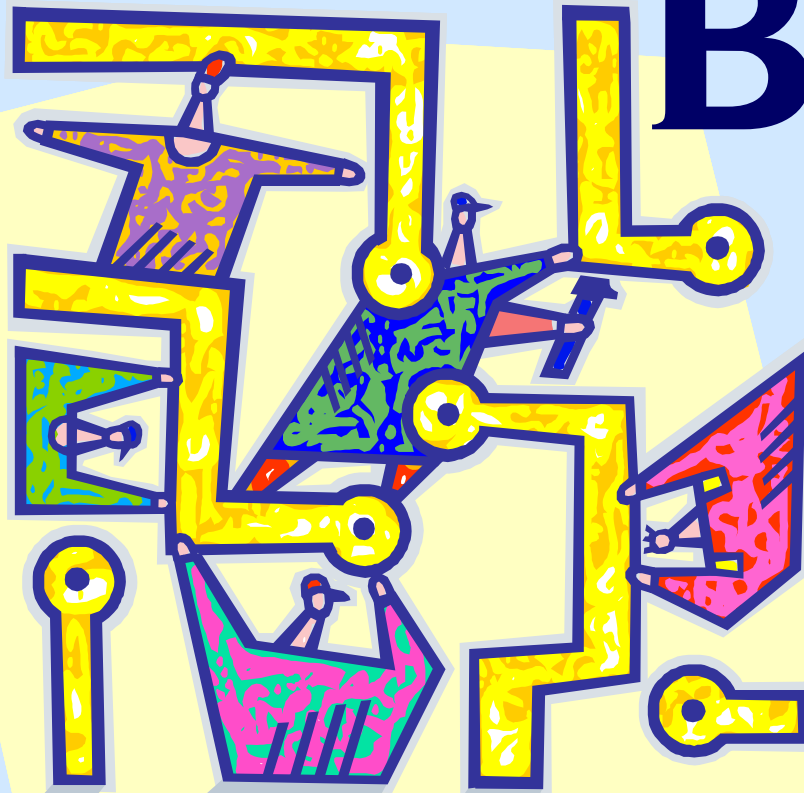


# *Planning Basics*



## *A Guide for Developing Community Long-term Care Options*

**Division of Aging and Adult Services**

NC Division of Health and Human Services

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This document is available online at  
<http://ssw.unc.edu/cares/planningbasics/index.htm>

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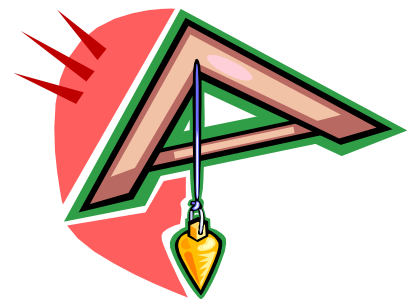
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*No matter how well the strategies are planned, carrying them out will be as hard as any collective activity the community has undertaken, and someone must be a patron and a leader to rekindle the fire of enthusiasm when progress is slow or resistance is high.*

—Kurt Jenne

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**T**he Planning Basics Notebook is a resource designed for communities interested in long-term care planning for older and disabled adults. It contains generic information on planning and facilitation in general, and it also includes long-term care-specific resources. We hope it will assist communities in developing responsive local systems of care for people with disabilities and their families and also that the generic portions will be useful to communities developing planning processes for other purposes, too.

# **Welcome to the Planning Basics Notebook!**

## **Development of the Planning Basics Notebook**

In 2001, recommendation 16 of the North Carolina Institute of Medicine's Final Report on Long-Term Care (which you can find at <http://www.nciom.org/pubs/long-term.html>) called upon the North Carolina General Assembly to encourage county commissioners to designate lead agents to organize local long-term care planning processes at the county or regional level. In addition, recommendation 11 of the same report lists a number of long-term care services that the Institute of Medicine's Taskforce recommends should be made available to all North Carolina residents, regardless of where they live or their economic status. These "core services" range from home and community-based supports to institutional services. In 2003, the North Carolina General Assembly recognized the importance of local planning for long-term care and in Session Law 2003-284, Section 10.8 F, called upon the Department of Health and Human Services to

implement a communications and coordination initiative to support local coordination of long-term care and . . . pilot the establishment of local lead agencies to facilitate the long-term care coordination process at the county or regional level. For those counties that voluntarily participate, the local long-term care coordination initiative shall aid in the development of core services, coordinate local services, and streamline access to services.

In response to this mandate, the Department of Health and Human Services developed a pilot project called the "Coordination and Communications Initiative" in two communities, Mecklenburg County, led by the Mecklenburg County Department of Social Services, and New Hanover County, led by the New Hanover County Department of Aging. In August 2003, these counties began work on developing county-based long-term care planning processes and evaluating their core services. By the end of 2004, both counties will have developed a strategic action plan and will be beginning the next phase, implementation.

The idea for this Planning Basics Notebook originated as the Communication and Coordination Initiative took form. We felt that, although planning information is easy to find, it is

more difficult to access useful information specific to North Carolina's political and service structure quickly. In addition, sometimes there is so much information on a topic that it may be difficult, especially when you are short on time, to wade through it all to find the basic information that you need. We hope that the Planning Basics Notebook will be a resource that you will consult often!

## Using This Resource

The Planning Basics Notebook provides over 200 pages of “real world” information to assist you and your community in developing and maintaining a successful and dynamic planning process. This resource is designed to give you a “quick and dirty” base of knowledge in a variety of important community planning topics such as facilitating and leading a community-wide effort, communication, teamwork, and data collection and analysis. In addition, we have included long-term-care-specific information, including a list of acronyms, a glossary of terms, and Internet resources. The examples throughout the resource are also specific to long-term care.

Although entire books could be (and have been) written on each topic included in the Planning Basics Notebook, we have chosen to include only the most important and useful information in each section so that you can use it as a fast guide to finding what you need, when you need it. For further study, we have included a resource list at the end of each section. The resource lists include books, articles, and websites where you can find more detailed information on the respective section topic if you or your planning team needs to delve deeper into an issue or topic.

When the Planning Basics Notebook idea was originally conceived, we designed it to be a resource for people leading the planning process. However, as work progressed, we realized that much of this information can be useful to every member of your planning team. We hope that you will share this resource with your team as well as others in your community as appropriate.

**We want to hear from you!** We hope the Planning Basics Notebook will be a living document that changes with input from communities using it to develop their planning processes. Please let us know what aspects of this resource your community found particularly useful, as well as sections that may need further clarification. We are particularly interested in topics that need to be included in future editions. We hope to hear from you soon.