

# Planning Tools

It will take a lot of hard work to create your new life. The Planning Tools section is here to make that work a little easier. It contains useful tools to assist you as you go through the transition process, and you will probably be looking at it frequently. Write in it, mark it up, make it your own – it is here to help!



# Goals and Timeline

Now that you have thought about what you want, it is time to write down your goals. Goal setting is an important part of planning your independent life. It helps you to remember where you are going, and what you are working for.

Make your goals as detailed as possible. They should be difficult, but not impossible! Remember, it takes many steps to climb a mountain, so don't worry if your goals seem small at first. It may be helpful to ask someone you trust to assist you with your goal setting – this might help you to keep your goals realistic.

## Goals

## Timeline for Achievement




# Phone Call Guide

As you move through the process of creating your own, independent life, you will have to make a lot of telephone calls. Some of the places you will be calling are very large organizations, and can be difficult to navigate. For this reason we have included a guide for you to use when making these calls. You may want to make a few copies of this sheet before you get started.

Today's date: \_\_\_\_\_

Person or organization you are calling: \_\_\_\_\_

Phone number of person or organization: \_\_\_\_\_

1. Introduce yourself.

2. Ask who you are speaking with and write that name here:

\_\_\_\_\_

3. Explain why you are calling.

4. Take notes on any information you receive:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. Were your questions answered? If not, try again later, and explain that you called before but still have questions. When calling large organizations, you may find that you need a lot of patience. Sometimes things move very slowly, and this can be frustrating when you are eager to get on with the process. The trick here is to **be persistent!** Remember that difficulties are part of the path to independence – even when it seems impossible, keep trying. Ask people in your support team for help and encouragement.

**YOU CAN DO IT!**

# Check Your Progress

As you work through your independent living plan, it will be helpful to check your progress. Use this checklist to make sure that you are accomplishing the basic tasks that need to be done.

Have you found a Personal Care Assistant (if necessary)?  Yes  No

Have you arranged to have any necessary medical or assistive equipment in your new home?  Yes  No

Have you located and contacted a community physician?  Yes  No

Have you notified social security about your change of address?  Yes  No

Have you set up or received travel training (if necessary)?  Yes  No

Have you prepared a budget?  Yes  No

Have you arranged for meal assistance (if necessary)?  Yes  No

Have you set up your utilities (if necessary)?  Yes  No



