

THIS IS YOUR LIFE!

CREATING YOUR  
SELF-DIRECTED  
LIFE PLAN

Determine Your Destiny

**UIC NRTC Self-Determination Series**

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SELF-DIRECTED  
LIFE PLAN

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*Determine Your Destiny*

**You may want to use this workbook with our tool, “Express Yourself: Assessing Self-Determination in Your Life.” These tools are products of the UIC Solutions Suite, which can be found at <https://www.center4healthandsdc.org/solutions-suite.html>**

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**This Plan belongs to:**

**Your Plan will contain some private information. In case you lose it, you can put your name and phone number or address on the below lines. If you'd rather not have your name on it, then you can leave this page blank.**

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## **Introduction**

### **What is this Workbook?**

This workbook can help you figure out what you want out of life and how to get there. It will help you make plans for your own life, with supports of your own choosing.

Some common goals are:

- to make a friend
- to find a better place to live
- to better manage a medical condition (like diabetes or high blood pressure)
- to get a job or a better job
- to go to school
- to get more involved in your community

If you have a life goal like this, use this workbook to see what you have, what you need, and what action steps to take to reach your goal.

If you don't have a life goal right now, and would like to pick one, you can get started with our tool, "Express Yourself: Assessing Self-Determination in Your Life." To find this tool, visit <https://www.center4healthandsdc.org/express-yourself.html> or call us at (312) 355-1696. Or, you can use this workbook to choose a personally meaningful life goal (as described in more detail in Step 4, starting on page 25).

This workbook can help you accept that you are a WHOLE PERSON, with many ideas and goals. This is true no matter what hard times you've had or are still having.

### **Who Should Use this Workbook?**

This workbook is for people who have lived experience of a mental illness or a psychiatric disability, have been hospitalized for psychiatric reasons, or have found it hard to do certain things in life because of mental health issues. Other people may find the workbook useful, but it is directed toward people with lived experience.

Many people with lived experience feel like large parts of their lives are no longer their own. They may even feel like they have *become* their illness or diagnosis, and that few people see the other important and interesting

things about them. Too often, people in mental health recovery face poor treatment and discrimination in their communities and their service systems.

If you feel like this, then this workbook is for you. It can help you start believing that there really is more to life than your diagnosis. It can help you begin to see that you are a capable person, worthy of respect and love. You will start to see that you can set a goal and reach it, even when you make mistakes.

Why do we believe this is possible? Because research shows that PEOPLE WITH LIVED EXPERIENCE CAN AND DO RECOVER. This is true even 20 or 30 years after first having mental health problems or being diagnosed for the first time!

**People with mental illness  
can and do recover.**

There are many things that recovered people have in common. We will talk about these things throughout this workbook. You'll learn that one of the most important recovery or self-determination strategies is:

**having a goal or sense of purpose in your life.**

Pat Deegan, Ph.D., a well-known psychologist who is in recovery, calls this a “**survivor’s mission**,” or something around which to organize your recovery\*.

This is why a workbook to help you make a Self-Directed Life Plan is important in your recovery.

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\*Pat Deegan, “Recovery as a Self-Directed Process of Healing and Transformation,” Retrieved December 9, 2003, [http://intentionalcare.org/articles/articles\\_trans.pdf](http://intentionalcare.org/articles/articles_trans.pdf)

## **What is a Self-Directed Life Plan?**

A Life Plan. To explain this idea, let's start with what a **Life Plan** means.

A Life Plan is basically just that – a Plan for what you would like to do in your life. It helps you look at areas where you want to set new goals or make some changes. Some of these areas are:

- where you live
- who you spend time with
- your emotional health
- your physical health
- where you get services and supports for your needs or problems
- where you work or go to school
- how you spend time in your community

It may seem too hard to think about all of these things when you first read this workbook. It helps to remember that nobody makes life changes all at once. Most people pick one area to work on at a time, which is what makes success possible.

It also helps to remember that most people, with and without disabilities, complete at least some goals every day. Think about it like this. Most days, you probably do a lot of things like shower, eat breakfast, read the paper, go to work/school/a program, take a walk or exercise, and so on. We don't usually think about these things as goals, but they can be. So, you already have at least some history of setting and reaching goals! Remember most people's Life Plans are built on small goals to reach a larger goal.

**Most people's Life Plans are built on small goals to reach a larger goal.**

Self-Directed. A “self-directed” life plan means that YOU are in the driver’s seat. You choose what goals you want to work on and how to achieve them. You call the shots and set the pace. But, this doesn’t mean you won’t have help. We all need advice and support to succeed and to cope with disappointments. But, you are responsible for this plan and for your own decisions about it. This is your plan to make, break, change, or scrap. This is what it means to be self-directed. It can be liberating, but also a little scary.

If taking control like this makes you nervous, try to find people who have been where you are and have succeeded at a life change. Also, work at a slower pace that allows for small steps. Give yourself time to think and change your mind or plans.

Remember, just because you’re the driver doesn’t mean you have to go from 0 to 65 miles per hour before you’re ready. To stretch the analogy, plenty of us start out by joining Driver’s Ed, getting our permit, and then driving only the back roads, long before we take to the highway.

## **What Does this Mean for Me?**

At this point, you may be thinking, “Get real! What’s a Self-Directed Life Plan *really* mean? Is it just another fad? Will I have to do things I don’t want to do or can’t do? Is it just another way for someone else to tell me, everything would be better if I’d just get it under control and help myself more?”

Frankly, the answers to these questions are yes and no. Self-direction, self-determination, recovery, integrated health – these **are** the latest trends in mental health. But, it’s also true that a new fad isn’t necessarily a bad fad. Actually, in this case, it’s very good. It means that more people think that individuals with lived experience can be in charge of their own lives, with good supports and services focused on hope, recovery, and valued life roles.

Will you have to do some things you don’t want to do? Sometimes! But, we all do things that are hard, scary, or feel risky when trying something new or changing our lives. That’s why throughout the workbook you’ll see that you must have support from family, friends, peer supporters, mental health professionals, and others as you make your Life Plan.

Will you have to take responsibility for your goals and help yourself along the way? Yes. But this does NOT mean you won’t have help. You will have to help yourself by setting and working towards your own goals. But part of this involves getting help from trusted people in your life. Also, you can always change your mind, slow things down/speed things up, or take breaks when you’re not feeling well. You set the pace because this is your Plan.



## **How Do I Use this Workbook?**

This workbook will help you **pick one area** in your life to set new or different goals. You can work on more than one life area at a time, but most people find it easier to succeed by choosing one area.

This is your workbook and your personal journey. You can go through the workbook in order or you can skip sections that aren't for you. You should use the workbook in whatever way is most comfortable for you. But, here are some steps you might want to take when starting out, based on what has worked for other people:

### **1. Read the whole workbook before you start writing down your goals and tasks.**

Reading the whole workbook before you begin will help you see the kinds of information and exercises it offers. But, you can skim through it, if reading the workbook all at once is too much for you.

### **2. Choose at least one person who will support you in this process.**

This person should believe in you and stick with you through ups and downs. We'll talk more about this in a later section.

### **3. Set aside time each day to go through the workbook, to make plans, and to review how you are doing.**

Try to pick a time when you are most rested and focused. Once your goals and tasks become second nature, you may only need a few hours each week to review your plans, self-care strategies, and progress.

### **4. Pick only one or two pages to work on at a time, especially at first.**

If you try to work on a lot of sections of this workbook at one time, you may become discouraged or overwhelmed. This isn't a test, and there are no time limits. You can work on this at a slow or moderate pace, so you don't burn out or give up.

### **5. If you have them, talk with your providers (both peer and traditional), about how this Life Plan fits with your treatment plan and other goals for your life.**

You can certainly use this workbook alone, without your providers and peers. But, many people find it's better to have someone to talk to when they can't decide on a goal, want to change one, feel things aren't going as planned, or want to celebrate success.

## **What Else Do I Need to Know?**

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, we'll start school – 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 why we give up on a goal. Some of them are: 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. If this sounds familiar, here are a few things to keep in mind.

### **1. Life change is a process, not a one-time event.**

Making a life change takes small and big steps made over time. And just about everyone will have set-backs along the way, no matter how hard they try or how good their plans are. Set-backs are to be expected, and they do not mean that you won't ever be able to reach your goal.

But sticking with your Life Plan won't *always* be hard. Part of the process should include time for relaxing, having fun, and staying connected with people who give you hope. Life change may not be quick, but it can be rewarding over time, if you remember these things:

- the path to change is made up of small steps (don't plan too big),
- everyone gets stuck at least once along the way, and
- we all need to plan for having fun and finding support when making life changes.

**Set-backs are to be expected, and they do not mean that you won't be able to reach your goal.**

**2. You are more likely to succeed if you figure out “where you are,” in terms of making a life change.**

Again, because life change is a process, not everyone is at the same place at the same time. Depending on the life goal you want to reach, you may find that you are not yet fully ready. You may need time to just **think** about making the change, rather than actually making the change. You will be more likely to succeed if you know what “stage of change” you are in, and how it may shape your plans. Find out more about what this means for you in the section starting on page 9.

**3. Taking care of yourself (also called self-care) is absolutely central to your success.**

If you neglect your emotional, physical, and spiritual health while working on your Life Plan, you will find it hard to succeed. This doesn't mean that you have to do good, healthy things every minute of the day. Most of us don't. But, taking care of yourself most of the time will set the stage for success. Again, connecting with supportive people in your life is a big part of making this happen. Check out the section starting on page 17 to figure out how to make self-care part of your daily routine.

## **Making Your Self-Directed Life Plan**

There are many ways to go about making a Life Plan, but we have found that having some steps to follow makes it easier to manage.

Steps that others have found useful are:

- Step One:           Where Am I in the Change Process?**
- Step Two:           Getting Ready to Make and Use a Life Plan**
- Step Three:        Creating your Circle of Support**
- Step Four:         Considering Change and Choosing a Life Goal**
- Step Five:         Planning for a New Goal or Life Change**
- Step Six:           Acting On a New Goal or Life Change**
- Step Seven:        Maintaining Success**
- Step Eight:        A Look to the Future**

Let's look at how each of these steps helps us to make a Self-Directed Life Plan.

## Step 1: Where Am I in the Change Process?

If you've read this far into the workbook, you probably are at least thinking about making some kind of life change. You may want to make a friend, get better control of your mental health problems, lose or gain weight, get a job or earn some money, go to school, take up a hobby, or do something else.

Whatever change you are hoping to make, you will go through a process to get to your ultimate goal. For most of us, this process involves moving from being unaware or uninterested in the need for change, to considering the pros and cons of change, to making actual plans for change, to acting on and maintaining change over time.

Uninterested in Change

Considering Change

Planning Change

Acting On & Maintaining Change

James Prochaska and his colleagues call this idea the "Stages of Change Model" (see the Resources at the end of this workbook for more information). This model has been used to understand how life change works in many different areas, like substance abuse, smoking, or dieting for health reasons.

The basic idea is that when we are faced with changing our lives in some way, we need to first figure out the stage of change we are in. This will help us decide whether we're ready to make change, and what we need to do to succeed, if we *are* ready.

**If you are not ready for a life change, but everyone around you is expecting you to change something, things may not work out very well. This is because people in your life are jumping ahead of you in the process.**

**Or, if you have moved to considering a life change, but others in your life have moved to actually planning the change, you may feel rushed or that you aren't being understood or well supported.**

So, the best way to approach things is for you and your supporters to understand where you are in the change process. Again, if you have read this far, you have probably moved beyond the first stage (unaware of or uninterested in the need for a life change) and into one of the next stages: considering a life change, or preparing to make a life change, or acting on a life change.

**To help you figure out what stage of change you are in, ask yourself these questions:**

1. Do you feel that you would like to change something in your life, to make it better, healthier, happier, or easier?

Yes            No            Don't Know

2. Have you been thinking lately about a **specific** thing in your life you either don't like or would like to change?

Yes            No            Don't Know

3. Do you intend to start planning **within the next 6 months** exactly what you need to do to make a life change (it doesn't matter right now what the change is)?

Yes            No            Don't Know

4. Have you **already started** to make changes in your life to make it better, healthier, happier, or easier?

Yes            No

If you answered, “Yes,” to one of the first two questions (or both), then you probably are in the **considering a life change stage** (Stage 2).

In this stage, you will be most focused on gathering information about the change you want to make, and on weighing the pros and cons of change. As you consider what change will mean for you, some helpful strategies would be:

- hearing other people’s success stories
- receiving encouragement from people who’ve been there
- receiving information about approaches or your options

**Many people stay in this second stage for a long time before they are ready to move into actual planning and action for change. If this happens to you, don’t worry. It’s common, and the more you consider your options, the easier it will be once you are ready to plan and act.**

If you answered, “Yes,” to the first three questions (or just the third one), then you probably are in the **preparing for a life change stage** (Stage 3).

In this stage, you need to define tasks -- and find tools and resources -- that will support your specific life change. Your family, peers, providers, and other supporters need to know that you are ready for a change. They can help you define tasks and find resources. They will help you remember that you may need to try many different things before you find the best options for your own situation. In this stage, you will also need to reward yourself for small steps you make.

It will help to remember that set-backs are common, and aren’t a sign that you won’t succeed.

If you answered “Yes,” to all four questions (or just the fourth one), then you probably are in the **acting on a life change stage** (Stage 4).

In this stage, you most need support and encouragement for the changes you’ve already made, and plans you have for maintaining success over time. In all stages of change, attending peer-led or self-help groups is a good idea, but peer support may be especially useful in the fourth stage as you try to stick with your new plans.

If you answered “No” or “Don’t Know” to any of the questions, then you may not be ready to consider or prepare for a life change at this time. That’s okay! It’s better to know where you are than to have change forced upon you, which is too discouraging. However, you should still finish reading this workbook because you may find that, as you gain more information and skills, you will become ready to consider, plan, and act on a life change.



## Step 2: Getting Ready to Make and Use a Life Plan

No matter what your goals, or what stage of change you are in, taking care of yourself is key to success. Before you get started on making your Life Plan, it's helpful to think about the following questions:

- What are your hardest emotional or mental health issues?
- Who are you, aside from your diagnosis or special needs?
- How do you cope right now with your mental health problems?
- What new, daily self-care strategies might work for you?

We will go through each of these questions on the next several pages.

Note that taking care of yourself may be your major life goal right now. We give suggestions in the following sections about what to do if this is true for you. Or, self-care may be the foundation on which you build your other life goals. Either way is okay, just as long as you are moving towards or maintaining ways of taking care of yourself each day.

There are lots of good books and tools out there to help you think about your physical and emotional health. Some of them are listed at the back of this workbook. We encourage you to use the ones that are best for your situation and beliefs.

Remember that no single thing works all the time for everybody. Service providers or peer supporters may tell you that what worked for other clients or for themselves will work for you. Sometimes this is true, and sometimes it isn't. So, it's best to have different kinds of services and supports to help you along the way. This can include family, friends, medical doctors, psychiatrists, peers or self-help groups, therapists or counselors, case managers or service coordinators, religious leaders, advocates, culture-specific healers, crisis workers, medications, and so on.

## **My Emotional & Mental Health Needs**

People have different ways of describing their mental health needs. Some people call what's going on with them, "psychiatric symptoms." Others call their difficulties, "emotional distress" or "emotional crises." Still others call their struggles, "spiritual crises" or "life problems."

Whatever you call your difficulties, start by answering the questions below. Note that some of the things we're asking you to write down may be hard to think about. You probably deal with them a lot, so they aren't new to you. Yet, describing your struggles in writing can make them seem more overwhelming and painful. So, be sure to talk with supportive people in your life if this exercise is hard for you. Also, remember that part of overcoming problems involves giving them a name, so you can either learn ways to manage them or to let them go over time.

### **My hardest mental health problems are. . .**

You also might want to include things that are hard for you that are not specific "symptoms." Some of these may be: grief, bad memories from the past, unsuccessful attempts at work/school, or being let down by others in life.

### **Another way to think about it is, I Feel Worst When. . .**

**Emotional problems that keep me from doing things I want to do are. . .**

We talked earlier about the fact that you are a WHOLE PERSON. Your diagnosis or special needs are only one part of who you are. It may not feel like this sometimes, especially when you are most bothered by your mental health problems.

But many people say that remembering **they are more than a diagnosis** is key to their recovery.

### **Who Am I Besides My Psychiatric Diagnosis or Special Needs?**

Some examples are: funny, creative, smart, easy-going, loyal, caring, a friend, a sibling, a spouse, a parent.

**Remember to look at this list when you feel bad or discouraged.**

Now let's think about ways that you already cope or deal with your emotional or mental health problems.

Almost everybody with a diagnosis of mental illness already has ways of coping or getting through the rough times. You may not think of the small things you do as coping (like taking a hot shower when you're stressed out), but that's exactly what it is. Of course, many of us have coping strategies that are less healthy like taking drugs or consistently over-eating. So, it's good to remember that recovery involves relying less on these ways of coping over time, and more on ones that are healthier for us.

It may not seem like it sometimes, but you do have some power to determine the role of your difficulties in your life. You can decide that you want to start taking charge by managing your illness or needs. Or, you can decide you're not ready for this yet, and figure out what **is** manageable right now. Either way is okay, as long as you aren't actively harming yourself/others or considering harming yourself/others.

Keep in mind that most people, especially those who are very bothered by their mental health difficulties, develop coping strategies over a period of time, sometimes several years. No matter what, it will take time to try new things, make mistakes, and try something else, before you find the best ways to cope with your symptoms or problems.

It helps to keep an open mind and to be willing to try new things until you find what works best for you.

## **How Do I Cope Already with My Mental Health Needs?**

Some examples are: talking with my spouse/intimate partner, reaching out to my family, hanging out with a friend, taking medications, surfing the web, going to a program or group, talking with a doctor or other service providers.

**Another way to think about it is, I Feel Better When I . . .**

Now let's give some thought to **new** self-care strategies you might want to try. Again, check the back of this workbook for resources on making daily self-care plans, but you can use the exercise below to get started.

Try to put your list on the next page in the order of most important to least important. Be **very specific** about how much or how often you need to do something each day. For example, rather than just writing, "I need to exercise to feel better," you would put: "I need to take a 10-minute walk each morning (or afternoon or evening)."

Also, try to think of things that would be fun for you, so that taking care of yourself doesn't become a burden. For example, if you want to get more exercise, a fun goal might be to play your favorite songs and dance your cares away for 15 minutes each morning or evening (rather than doing something more standard, like biking, jogging, or walking).

**Remember that developing these self-care strategies may be your major life goal right now. That's okay! If so, you can turn to page 32 (Step 5: Planning for a New Goal or Life Change), and start working on the exercises related to your new Mental Health Self-Care Goal.**

**What NEW Things Do I Need to Do  
EVERY DAY to Take Care of My Self?**

Some examples: having routines, eating well, taking vitamins/medications, drinking more water, sleeping, laughing, painting/writing, being with friends, having time alone, praying/meditating.

Remember, you need to put **HOW OFTEN OR HOW MUCH** each day.

**Remember to check this list each morning.**



### **Step 3: Creating Your Circle of Support**

What is a Circle of Support? This idea comes from the disability and independent living movements. It refers to the need for each person with special needs to have a network, group, or “circle” of supportive people to help reach daily and life goals.

A Circle of Support is made up of people who have hope for you, care about what happens to you, advocate for you when you’re not feeling well, stick with you, and believe that you can achieve what you want in life. Members of your Circle may not be available to help every time you need it (let’s say one of them just got a new job), but you still can include them, since your Circle of Support is made up of people who will help you over the long-term.

**We’ve talked about this already, but we can’t say enough how important it is for you to have support while trying to reach your life goals.** You should know that many people with lived experience say that the only support they have is from mental health professionals. If that’s true of you, it’s okay and can be a good place to start. Over time, you probably will want to talk with them about how to add to your Circle of Support by reconnecting with family, making a new friend, dating, and so on. But if you only have a psychiatrist or social worker to support you right now, that’s a good start.

In creating your Circle of Support, it’s helpful to think about what you have and what you would like or need. If you feel you already have a solid Circle of Support, it helps to review who is in it and whether it still meets your support needs.

## **Who Are My Current Supporters?**

Some examples are: friend, doctor, social worker, parent, sibling, boss.

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## **Who Else Would I Like in My Circle of Support?**

Some examples are: intimate partner, spouse, friend, teacher, co-worker, peer advocate.

## **Adding to Your Circle of Support**

If you've said that you would like to add people to your Circle of Support, let's think about some first steps you might take to do that.

Perhaps the easiest first step is to let people already in your Circle of Support know that you would like to add another member to your Circle. They should have ideas for how you might reconnect with family/old friends or meet new people. They can help you look at what may have led to friendship or relationship struggles in the past, on both sides. Your Circle also can help you work on avoiding hurtful situations in the future and on developing new, healthy relationships.

If you would like to reconnect with a family member or old friend, it may be hard to think about being the first one to reach out. You may have had a falling out. You may be embarrassed about how you (or they) acted the last time you saw each other. Or, you may still be hurt or angry with them, even if you want them back in your life. Because of the emotions involved, you will need peer and/or professional support as you make plans to reconnect and take that first step. You also may need some supportive but honest advice about whether it's healthy for you to reconnect with certain people, especially those who may have hurt you or who lead you to make unhealthy life choices. If you are hoping to reconnect with your children under the age of 18, you probably are going to need legal advice as well.

If you want to meet someone new, many people find it helpful to:

- join a support group
- take a course at a local college or community center
- volunteer in the community
- attend a worship-based event or group (at church, synagogue, or Mosque)
- visit on-line chat/support groups
- spend time with other adults who share a common interest or hobby

Believe it or not, making friends isn't easy for most people, especially as we get older. You may find that you need to plan very small steps that will lead you to making one new friend or relationship over time.

If adding members to your Circle of Support is your major life goal right now, you can skip to Step 5: Planning for a New Goal or Life Change (starting on page 32) and begin working on the exercises that relate to your new goal of *Developing (or re-developing) a Friendship/Relationship*.

**Adding to your Circle of Support may be your major Life Goal right now. If so, you can use this workbook to set and meet specific goals in this area.**

## **Step 4: Considering Change and Choosing a Life Goal**

And we're off!

You're ready to consider and choose a new life goal. At this stage, you are just **starting to think about changing** something in your life. You may want to think about making a friend, better managing a health condition, getting a job, quitting smoking, or moving into a better apartment. At this point, you are not ready to start making actual plans or to make changes.

See "Step 1: Where Am I in the Change Process" if you're not sure of what stage of change you're in right now (starting on page 9 of this workbook).

At this "thinking" or "considering" stage, you will benefit most by:

- thinking about what you like about your life
- figuring out what you don't like about your life
- considering what you would most like to work on changing
- deciding what good things will happen if you make a life change
- looking at why/how change may be hard for you

You also will benefit from talking to people who've been where you are, to hear about what was good and what was hard about making a change in their lives.

Remember, you may take several months to choose a goal that seems right for you, and that will bring more good things than hard things into your life. Take it slowly so that you can be sure you are choosing a life change that you actually can plan and act on when you're ready.

**You can choose more than one life area to set goals in, but you probably will find it easier to succeed if you take it one area at a time.**

It may seem funny to you, but no matter how old you are, you can think about choosing a new life goal. It's true that your journey will be different when you're just starting out compared to when you've got some mileage on you, but making life goals is possible from age 16 to 96! And all of us, even if we're mostly happy with our lives, find that our views, outlook, and goals may need a tune-up every now and again.

Remember you may have decided already that your life goal is either "self-care" or "adding someone to your Circle of Support." If so, you don't need help choosing a goal, and can skip right to page 32 to begin **planning for** one of these goals.

## **What Do I Like About My Life?**

Some examples are: I have a good friend, I like where I live,  
My physical health is good, I have hobbies I enjoy.

## **What Would I Like to Change about My Life?**

Some examples are: I'd like to make a friend; I'd like to find work or a better job;  
I'd like to live someplace nicer; I'd like to be physically healthier;  
I'd like to go to school; I'd like to learn how to relax and have more fun.

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## **Which One of These Changes is Most Important to Me Right Now?**

Another way to think of it is, What One Change Do I Want to Think about Making?



It's likely that what you picked as most important will fit into one of the below major life areas. If not, we've included a space for "other," so you can add it. This list will help you double-check if what you chose as most important right now is actually most important to you. In other words, some people change their minds once they see a major life area they had forgotten about. If this happens to you, no problem! As we said before, this isn't a test and you're free to change your mind at any time.

**What Life Area Do I Plan to Work On?**  
(check one)

- |   |   |
|---|---|
| <input type="checkbox"/> Friendships/Relationships<br>(with current or future friends,<br>spouse, intimate partner,<br>family members, and so on) | <input type="checkbox"/> Self-Care of Mental and<br>Emotional Health                        |
| <input type="checkbox"/> Employment   | <input type="checkbox"/> Physical Health  |
| <input type="checkbox"/> Housing  | <input type="checkbox"/> Addiction Recovery   |
| <input type="checkbox"/> Starting a Family or Reuniting<br>with Children  | <input type="checkbox"/> Trauma Recovery (from physical,<br>sexual, and/or emotional abuse) |
| <input type="checkbox"/> Volunteering   | <input type="checkbox"/> Hobbies or Leisure Time  |
| <input type="checkbox"/> Faith or Spirituality  | <input type="checkbox"/> Involvement in My Neighborhood<br>or Community                     |
| <input type="checkbox"/> Creative/Musical Interest  | <input type="checkbox"/> Other (list here):   |

Each life change will bring good things and hard things into your life. That is the nature of change. Because one of the greatest obstacles to change is fear of what may happen, it's very important to think now about what you may like and dislike about making a life change. This will help you to work with your Circle of Support to prepare for how to deal with the harder things. For example, moving to a new apartment may mean that you are far away from a friend you've made (a hard thing about the change), but it also may mean that you are safer and farther away from situations that have led you to make unhealthy choices (a good thing about the change). As another example, healthier eating might mean having less of your favorite comfort foods like fried chicken or hamburgers (a hard thing about the change), but it also may lead to lower blood cholesterol for you (a good thing about the change).

One way you'll know you're ready for change is when you start to believe that the good things will outweigh the hard things that change always brings.

### **What Good Things Might Happen If I Make This Change?**

## **What Hard Things Might Happen If I Make This Change?**

## **Step 5: Planning for a New Goal or Life Change**

As we talked about before, if you are in this stage of planning for a change, **you are ready to think about tools, resources, and tasks** to support your new life goal.

See “Step 1: Where Am I in the Change Process” if you’re not sure which stage of change you’re in, starting on page 9.

At this stage, you need to figure out:

- the steps you will take once you’re ready for action (start small to ensure success)
- your obstacles to success (inside and outside of you)
- your resources (inside and outside of you)
- your budget
- what kinds of support you need to meet your goal

Remember, you aren’t ready yet to start **doing** the things you’re planning. You should focus your energy on figuring out what you have, what you need, and what types of tools or information would help you reach your goal someday.

**The best way to succeed is to take it slow, and move from choosing a life goal, to planning how to meet the goal, to someday acting on the goal.**

**You DO NOT need to do all these things at once to make a Life Plan. You may spend several months choosing a goal, another few months planning how to meet the goal, and several years acting on the goal to make it happen.**

**This is how a Life Plan works for most people. Few changes happen overnight – or even in a year! – which is why building time and space into your plans is so important.**

## **Step 5: Planning Your Goal**

Write down your goal  
in this column.

Remember, you  
only do this when  
you're ready to  
start **planning** your goal.

Flip to the next page  
when you're ready to  
plan tasks to reach  
your goal.

**MY GOAL IS. . .**

Cut along dotted line.

## Step 5: Planning Your Goal

Now you're ready to list the tasks or steps you need to take to reach your goal. Remember to plan for small steps, so that you can manage the change.

For example, if your goal is to **get a job**, some of your tasks might be:

- find employment counselor;
- do job assessment;
- pick type of job wanted;
- get a job coach/job support;
- write cover letter and resume;
- schedule interview;
- send thank-you note; and so on.

If your goal is to **make a friend**, some of your plans might be:

- make a meal for people I live with,
  - make shopping list,
  - invite people,
  - cook meal,
  - smile or talk to 1 person that night,
  - ask 1 person to have coffee with me next week,
- when we meet for coffee, I'll start by asking my new acquaintance 1-2 questions; and so on.

**Use the back of this sheet if you need more room to write.**

### TASKS TO REACH MY GOAL

# Tasks

Cut along dotted line.

## Step 5: Planning Your Goal

Now you're ready to list the **OBSTACLES** to your goal. These are things you will need help with to succeed at your goal. They're also called barriers.

For example, if your goal is to move into a **new apartment**, some of your obstacles or barriers might be:

- I can't afford the security deposit;
- The neighborhoods I can afford are not safe;
- I need help finding a roommate;
- The place I'd like to live is far away from my service program (or work or school); and so on.

**Remember to use Your Circle of Support (and others) to cope with these barriers so they don't interfere with your plans.**

### OBSTACLES

**Obstacles**

Cut along dotted line.

## Step 5: Planning Your Goal

Now you're ready to list the **RESOURCES** you have to support your goal. These are things you have inside or outside of yourself that will keep you motivated along the way.

For example, if your goal is to go **back to school**, some of the resources inside and outside of yourself might be:

- I stick with things once I start them (inside);
- I like to learn new things (inside);
- I have a good school in my community (outside);
- I would be eligible for financial aid (outside);
- My family can help me get a computer when I'm ready; and so on (outside).

**Remember to use Your Circle of Support (and others) as a source of encouragement, resources, and tools for success.**

## RESOURCES

**Resources**

Cut along dotted line.



## Step 6:

### Acting On Your Goal

For each of your tasks, set a date by when you will finish it. Try to give yourself plenty of time to avoid putting undue pressure on yourself. See page 38 for advice about completing this page once you're ready.

**Remember, you only fill in this column when you are ready to start acting on your goal. Leave this blank until you are ready to take action.**

#### TARGET DATES

Task 1:

Task 2:

Task 3:

Task 4:

Task 5:

Task 6:

Task 7:

**Dates**

## **Making a Personal Budget**

Now it's time to think about your finances, since they are related to planning your goal. We'll take a look at your current income and expenses each month. Then, we'll look at new expenses or income that may be part of your new goal.

You should know that for many people in the mental health system, talking about money is difficult. First of all, poverty and financial troubles are a reality for many people with disabilities of all kinds. This can make life planning hard to imagine let alone achieve. Secondly, many people feel they have little control over how much money they get, or how they spend their own money.

Yet, thinking about your finances is key to getting a handle on where you are and what you need to control your own life. If possible, you should go over this section of the workbook with your Circle of Support or other people who support your financial plans. This means choosing people who believe that you ultimately can be in charge of your own money. It also means choosing people you wouldn't mind questioning you about whether your financial decisions are realistic and make sense. As long as you trust these people, such questions can help you get better control of your financial situation.

## My Personal Budget

Look at each income source that you have, and list the amount you get in a typical month. Some common sources of income are included to help you get started.

### INCOME SOURCE

### MONTHLY AMOUNT

Hourly, part-time, or full-time job:

---

Odd jobs or free-lance work:

---

Non-traditional sources of income  
(for example, recycling cans):

---

Entitlement check (SSI or SSDI):

---

Retirement check:

---

Gifts of money from family or friends:

---

Workers' compensation:

---

Food stamps:

---

Utilities subsidy:

---

Transportation subsidy:

---

Child support payments:

---

Loans from family/friends:

---

Other income sources:

---

---

MONTHLY INCOME TOTAL:

---

## My Personal Budget

Now look at all of your possible expenses, and list the amount you usually owe in a typical month. The following are common expenses to help you get started.

### EXPENSE

### MONTHLY AMOUNT

Rent/mortgage/housing costs:

---

Utilities (electricity, phone, etc.):

---

Meals:

---

Clothing:

---

Personal care items  
(toothpaste, soap, etc.):

---

Transportation (gas, car insurance,  
bus pass, train fare, etc.):

---

Personal habits/needs (cigarettes,  
candy, soda, snacks, etc.):

---

Recreation (movies, museums,  
sporting events, music, etc.):

---

Child or elder care (if you have  
kids or aging parents in the home):

---

Expenses for children, if any (diapers, food,  
clothes, school supplies, etc.):

---

Other Expenses:

---

---

MONTHLY EXPENSES TOTAL:

---

## **My Personal Budget**

With your current budget in mind, it's time to think about the expenses associated with your NEW life goal. Take a look at your goal again. Make a list of the expenses that will be necessary to make this goal a reality.

Talk with your Circle of Support and others involved in your life to get ideas for what your expenses may be. Also talk with them about plans you should make to cover these new expenses. Sometimes this will involve cutting back what you spend in other areas. Sometimes it will mean talking with a financial or benefits counselor about ways your current income supports might be used to fund part of your goal. Other times it will mean figuring out if a job or a loan (from family or elsewhere) is possible to meet the expenses of your new goal. Of course, your plans and options will depend on your life goal and personal life circumstances.

### **Expenses From My New Goal**

Some examples are: books about career planning; special employment training; personal fitness training; a business investment or apartment security deposit; new clothes for work or exercising; new/extra transportation; a computer, uniform, tools, or other job/school equipment.

1.

2.

3.

4.

5.

Now it's time to think about how your Circle of Support and others in your life can help you plan for your new life goal. What can they do themselves, and what can they do to link you with other supports or resources?

### **How Can My Circle of Support Help Me Plan for My Goal?**

Some examples are: Help me gather information about what I need to reach my goal; Help me get college/school applications to see what I'll need to do when I'm ready; Help me research affordable fitness centers or classes in my community; Help me write out steps to my goal when I'm ready; Help me make plans to address barriers to my goal.

## **Step 6: Acting on a New Goal or Life Change**

As we talked about before, if you are in this stage of planning for a change, **you are ready to start acting on your tasks and goals.**

See “Step 1: Where Am I in the Change Process” if you’re not sure of what stage of change you’re in, starting on page 9.

In this stage, you will find it most useful to:

- make dates by which you will complete your tasks
- start doing your tasks and recording what happens
- decide how you will know if you’re making progress

Remember at this point you are ready to start doing the things you planned to reach your goal. If you aren’t ready to start setting dates and completing your action steps, you probably are still in the planning stage and aren’t ready to move forward. That’s okay! It’s best to pace yourself and start when YOU are ready.

### **Setting Target Dates**

Start by reviewing the steps/tasks, resources, and obstacles you prepared when planning for your life change (starting on page 32). You’ll see that there is a column there for you to set completion dates for each task. Now that you are ready to act on your goal, you are ready to fill in this column with the dates by when you will finish each task.

Try to set dates that allow you plenty of time to do what you need to do. Depending on your life goal, some steps or tasks may take weeks or even months to complete.

Also remember that these dates are not set in stone. The point of the dates is to keep you focused on moving forward. Sometimes you’ll find that a task takes more time or less time than you thought it would. That’s common. It simply means that you should adjust your dates to fit how long a task is really taking, once you start doing it. It’s also one of the reasons we recommended in the beginning of this workbook that you review your plans each week. Regular review will allow you to adjust your plans to fit what’s going on in your life.

## **Action!**

Congratulations! It's now time to start completing the steps to reach your goal.

Once you get started, use this page to make notes about how you think things are going. What feels good about working on your new goal? What makes it especially hard? What is going well and what is not going so well? How do you know you are (or are not) making progress as fast as you would like?

Making brief notes here about how it's going will help you talk things through with your Circle of Support or others in your life.

## **How Things Are Going. . .**



## **Step 7: Maintaining Success**

As we talked about before, if you are in this stage of planning for a change, **you are working on maintaining your success in achieving a goal.**

See Step 1, if you're not sure of your stage of change, starting on page 9.

In this stage, you will find it helpful to:

- reward yourself for your success while learning from your mistakes
- stay connected with peers and other supporters in your life
- learn to deal with set-backs or what to do if things aren't working out as planned

**Remember by “success” we do not only mean having reached your final goal. Success also means trying your hardest to complete each of your tasks. It also means learning from your mistakes and changing your plans when needed. Of course, reaching your final goal will be an awesome feeling, but it is NOT your only measure of success or reason to feel proud.**

## **Celebrate!**

Once you complete your first task – no matter how big or small – you should plan to do something nice for yourself. The best way to stay motivated is to reward yourself along the way. Doing something nice doesn't mean you have to spend a lot (or any) money. If you have some extra money, you certainly can celebrate by having a nice meal, seeing a movie, and so on. However, you can also do things like:

- give yourself the week off from doing anything hard
- borrow a video from the local library
- go to the park or beach or a museum (on a cost-free day)
- spend time hanging out with family or friends

**Some of us have a hard time being nice to ourselves. So, be sure to ask your Circle of Support to remind you when it's time to reward yourself, and to give you ideas for what you can do. They may even take part in the fun with you!**

## **Keeping the Dream Alive**

As we've said throughout this workbook, reaching goals doesn't happen overnight. It takes time, commitment, and dedication. Often times, it also means finding extra support or motivation to keep working on your goal.

### **List here things you can do to keep yourself motivated to work on your goal:**

Some examples are: Getting to know co-workers (or students or other peers) for fun and extra support; Talking with supporters and advocates about successes and set-backs; Finding new ways to manage stress when working on a goal; Posting affirmations or other encouraging notes to yourself around your home.

## **Dealing with Set-Backs**

It is the rare person who won't get discouraged, make mistakes, or have set-backs while working on a life goal. It's a part of life. So, the best thing to do is to make plans for how you'll cope when you don't feel good about yourself or how things are going.

First of all, it really can help to get a pep talk when you feel down or discouraged about your plans. Even if you're a private person or don't want to talk about it, you still may feel better just hearing from someone who believes in you, has been there, or otherwise gives you hope. This can be family, friends, peers, a therapist, a doctor, and so on.

**List here two people you can talk to when you feel discouraged:**

**1.**

**2.**

**List here one thing you'll do when you feel like giving up on your goal:**

**1.**

It also is important to make sure that you are still taking care of yourself each day. Sometimes, our plans start to fall apart when we aren't taking care of ourselves physically, emotionally, and spiritually. If you feel discouraged, look again at Step 2 of this workbook (starting on page 13), and where you wrote down your self-care plans. If you've stopped doing these things, you may want to put aside your life goal tasks and focus on self-care for awhile.

If you have been taking care of yourself and have been offered pep talks, but you still feel discouraged, then it's time to talk with your Circle of Support and others about what's going on. They can go over your plans and how things have been going to help you figure out what's happening.

They may help you see that you're being too hard on yourself, are afraid of success/failure, or have lost hope. They may help you see that you aren't using your time as wisely as you should, and you're running yourself ragged trying to get everything done. They may help you divide your tasks into even smaller steps to make things more manageable. They can help you find out if you've lost motivation to continue with your tasks, why, and what to do about it. They may help you discover that what's discouraging you is really beyond your control, and help you find ways to work around it instead of bumping up against it.

**Don't be afraid to ask for help. This is why you have a Circle of Support. Most of us lose perspective sometimes, and turning to supportive people can help get us back on track.**

## **What if Things Aren't Working Out?**

If after looking over your plans and talking things over with your Circle of Support, you still feel that things aren't going right, then it's time to look at your larger goal again (rather than just your tasks to get there). Ask yourself if this goal is still important to you. If not, then this is probably the reason things aren't moving forward as planned.

Or, it could be that in the course of working on your goal you learned something new about yourself. You may have learned that you're not cut out for a certain job, course of study, or whatever the case may be. Realizing something like this about yourself is NOT a failure. It's a normal part of learning about yourself as you try new things.

Or, it could be that as you're growing as a person, you may no longer actually be interested in the goal you once held for yourself. You couldn't have known this until you tried it.

If any of these things is true for you, then it may be time to consider and choose a new goal that better fits your lifestyle and new hopes for yourself.

If none of these is true for you, it could just be that you need a break from working on your goal. Sometimes, the goal is still important, but you have other things interfering with your progress that are making life too difficult to manage. Knowing when to put this work aside for awhile is as important as pushing yourself to succeed. Just be sure to set a future date for when you'll review your Life Plan with your Circle of Support, to see if you're ready to start working on your goal again.

## **Step 8: A Look to the Future**

**Congratulations!** You've made it to the final step of making a Self-Directed Life Plan. Be sure to do something nice for yourself to acknowledge all of your hard work.

Whether you're in the planning, acting, or maintenance stage of change, you are working towards creating a life for yourself that reflects your **WHOLE PERSON**. This isn't always easy to do, but we hope it will be rewarding for you over time. Remember that, with dedication, hard work, humor, and hope-inspiring supports and services, recovery is possible for you!

As a final thought, while you're working on your goal, it will help to keep track of the other things you want to do in your life. Doing this will help you to keep your energies focused on your current goal, without losing sight of the other things you'd like to do. It also will give you a list of new goals you'd like to consider and plan for, once you've met your first goal or if you change your mind and want to work on something else.

### **Other Things I Want to Do in Life Are...**

## **EXTRA NOTES**

## **Selected Recovery and Self-Determination Resources**

The UIC Center's web site provides many free resources, webinars, and podcasts on self-management and integrated health research and interventions: <https://www.center4healthandsdc.org/>

The UIC Center's Health & Recovery Solutions Suite: <https://www.center4healthandsdc.org/solutions-suite.html>

Self-Determination Series: Express Yourself: Assessing Self-Determination in Your Life. Written by Cook, Peterson, & Jonikas (2015). University of Illinois at Chicago National Research & Training Center. Call 312-355-1696 or visit: <https://www.center4healthandsdc.org/express-yourself.html>

Self-Determination Series: Raising Difficult Issues with Your Service Provider. Written by Petersen, Jonikas, & Cook (2003). University of Illinois at Chicago National Research & Training Center. Call 312-355-1696 or visit: <https://www.center4healthandsdc.org/raising-difficult-issues.html>

Self-Determination Series: Seeking Supported Employment, What You Need to Know. Written by Cook & Petersen (2003). University of Illinois at Chicago National Research & Training Center. Call 312-355-1696 or visit: <https://www.center4healthandsdc.org/seeking-supported-employment.html>

Self-Directed Care Implementation Manual: A Comprehensive Mental Health Program Guide: <https://www.center4healthandsdc.org/sdc-manual.html>



Wellness Recovery Action Plan® or WRAP:

<https://www.wellnessrecoveryactionplan.com/what-is-wrap/>

WRAP is an evidence-based practice that was developed by a group of people who experience mental health and other health and lifestyle challenges. These people learned that they can identify what makes them well, and then use their own Wellness Tools to relieve difficult feelings and maintain wellness and a higher quality of life.

The Recovery Workbook: Practical Coping and Empowerment Strategies for People with Psychiatric Disability. Written by Spaniol, Koehler, & Hutchinson. (1994, 2009). Boston, MA: Boston University, Center for Psychiatric Rehabilitation. <https://cpr.bu.edu/store/the-recovery-workbook/>

Peace of Body, Peace of Mind: Positive Solutions for Stress, Anxiety, Depression, Fears, Phobia, and Anger. Written by Rose Van Sickle: <http://www.pljunlimited.com/index.htm>.

Transtheoretical Model/Stages of Change:

<http://www.prochange.com/transtheoretical-model-of-behavior-change>

Developed by James O. Prochaska, Ph.D. & Carlo C. DiClemente, Ph.D., the stages of change model (on which our workbook is based) helps people understand and commit to health and life changes, based on their personal motivation and readiness.

Motivational Interviewing: <http://www.motivationalinterviewing.org/>

Motivational interviewing is a form of collaborative conversation for strengthening a person's own motivation and commitment to change. It is a person-centered counseling style for addressing the common problem of ambivalence about change by paying particular attention to the language of change.

The Boston University Center for Psychiatric Rehabilitation  
<https://cpr.bu.edu/>

The Temple University Collaborative on Community Inclusion  
<http://www.tucollaborative.org/>

Doors to Well-Being, National Consumer Technical Assistance  
Center  
<https://www.doorstowellbeing.org/>

National Association of Peer Supporters (N.A.P.S.)  
<https://www.peersupportworks.org/>

Depression and Bipolar Support Alliance (DBSA):  
<https://www.dbsalliance.org/>

Schizophrenia & Psychosis Alliance:  
<https://sczaction.org/>

GROW:  
<http://www.growinamerica.org/home>

NAMI Peer-to-Peer Program  
<https://www.nami.org/Support-Education/Mental-Health-Education/NAMI-Peer-to-Peer>

The National Mental Health Consumers' Self-Help  
Clearinghouse  
<http://www.mhselfhelp.org/>

The National Empowerment Center  
<http://www.power2u.org/>

National Association of Protection and Advocacy Systems  
<https://www.ndrn.org/>

MindFreedom Support Coalition International  
<http://MindFreedom.org/>