

The Brief Action Planning Guide

1 Mar 2014

A Self-Management Support Tool for Chronic Conditions, Health and Wellness

Brief Action Planning is structured around 3 core questions, below. Depending on the response, other follow-up questions may be asked. If at any point in the interview, it looks like it may not be possible to create an action plan, offer to return to it in a future interaction. Checking on the plan is addressed on page 2. Question #1 of Brief Action Planning is introduced in clinical interactions after rapport has been established.

1. Ask Question #1 to elicit ideas for change. "Situation" may be substituted when appropriate.

"Is there anything you would like to do for your health in the next week or two?"

- a. If an idea is shared and permission received, specify details as they apply to the plan. (Help the person make the plan SMART - Specific, Measurable, Achievable, Relevant and Timed).

"Many people find it useful to get very specific about their plan. Would that work for you?"

With permission, proceed.

"What?" (type of activity)

"When?" (time of day, day of week)

"Where?"

"How often/long/much?" (often: once, three times, five times; long: minutes, days; much: servings, meals)

"When would you like to start?"

- b. For individuals who want or need suggestions, offer a behavioral menu.

- i. First ask permission to share ideas.

"Would you like me to share some ideas that others I've worked with have tried?"

- ii. Then share two to three ideas ALL AT ONCE. The ideas are not too specific, relevant to their goal and varied.

"Some people I have worked with have _____, others have had success with _____ or _____."

- iii. The last idea is always one of their own. Then ask what they want to do.

"Do any of these ideas work for you, or is there an idea of your own that you would like to try?"

- iv. If an idea is chosen, specify the details in order to make the plan SMART (1a above).

- c. After the individual has made a specific plan, elicit a commitment statement.

"Just to make sure we both understand the details of your plan, would you mind putting it together and saying it out loud?"

2. Ask Question #2 to evaluate confidence. The word "sure" is a synonym for the word "confident."

"I wonder how sure you feel about carrying out your plan. Considering a scale of 0 to 10, where '0' means you are not at all sure and '10' means you are very confident or very sure, how sure are you about completing your plan?"

- a. If confidence level ≥ 7 , go to Question #3 below. ***"That's great. It sounds like a good plan for you."***
- b. If confidence level < 7 , problem solve to overcome barriers or adjust plan. Explain the reason to boost confidence. ***"5 is great. That's a lot higher than 0, and shows a lot of interest and commitment. We know that when confidence is a 7 or more, people are more likely to complete their plan. Do you have any ideas about what might raise your confidence to a 7 or more?"***
- c. If they do not have any ideas to modify the plan, ask if they would like suggestions. ***"Would you like to hear some ideas from other people I've worked with?"***
- d. If the response is "yes," provide two or three ideas (behavioral menu). Often the following menu applies: ***"Sometimes people cut back on their plan, change their plan, make a new plan or decide not to make a plan. Do you think any of these work for you or is there an idea of your own?"***
- e. If the plan is altered, repeat step 1c and Question #2 as needed to evaluate confidence with the new plan.

3. Ask Question #3 to arrange follow-up or accountability.

"Would it be useful to set up a check on how it is going with your plan?"

If they want to check, make the follow-up plan specific as to day, time and method (with themselves, with another via phone, email, in person, etc.)

Checking on Brief Action Planning

1. First ask, ***“How did it go with your plan?”***
 - a. If they completed their plan, recognize (affirm) their success.
 - b. If the plan was partially completed, recognize (affirm) partial completion.
 - c. If they did not try to do their plan, say, ***“This is something that is quite common when people try something new.”***
2. Then ask, ***“What would you like to do next?”***
 - a. If the person wants to make a new plan, follow the steps on page 1. Use problem solving and a behavioral menu when needed.
 - b. They may want to talk about what they learned from their action plan. Reinforce learning and adapting the plan.
 - c. If the person does not want to make another action plan at this time, offer to return to action planning in the future.

The Spirit of Motivational Interviewing

The Spirit of Motivational Interviewing underlies Brief Action Planning.

1. Compassion: Actively promote the other’s welfare.
2. Acceptance: Respect autonomy and the right to change or not change.
3. Partnership: Work in collaboration.
4. Evocation: Ideas come from the person, not the clinician or helper.