

## 7.9 Late Life Planning

### Policy

BACI is committed to the person-centered planning approach throughout the lifespan. A proactive and responsive approach to any changing circumstances and natural life transitions ensures an ongoing focus on what is important for the individual to experience a good quality of life.

This approach begins at the time of intake and is carried through each planning session. Planning well in advance encourages individuals, families and other members of their support network to be familiar with and explore the expectations and assumptions about growing older.

It is important to take the lead from the individual and/or their Legal Representative in this planning. Recognizing that everyone involved will have their own beliefs, customs and levels of comfort/interest in discussing late life and aging, it is important that BACI be sensitive to and honour the preferred level of engagement of each member of the individual's personal network.

### Definitions

**Late Life Planning** – Refers to the plans made prior to later life. It considers all aspects of a person's quality of life, including health, health care, legal and financial matters, work/community life, retirement, psychological issues, and social roles and resources (Adapted from the American Psychological Association, 2018).

**Advance Care Plan** – A written summary of an adult's wishes or instructions to guide a substitute decision maker if that person is asked by a physician or other health care provider to make a health care treatment decision on behalf of the adult.

**Medical Orders for Scope of Treatment (MOST)** – An official document (Medical Orders) that helps care providers honour what is important to the person. Physicians and other health care professionals use the MOST to relay the treatment wishes and decisions regarding a person's care to others who may be part of the integrated care team. It is a doctor's or nurse practitioner's order based on advance care planning conversations that explore the person's values, goals, and the range of beneficial treatments. Once decisions are made, the doctor will record this on the MOST form.

**Personal Support Network** – Refers to friends, family and/or community members who provide personal support, advocacy, and/or who help with monitoring services, and who have reciprocal relationships with an individual.

**Legal Representative** – A person or persons who are legally authorized to make decisions on behalf of the individual (e.g. Committee, Representative, Temporary Substitute Decision Maker). There are legal parameters regarding what kind of decisions can be made by different Legal Representatives and their role and responsibilities in carrying out these duties.

At BACI, late life planning relates to people over 50 years of age. We recognize that planning involves all aspects of an individual's life.

The following four categories are considered during the planning process:

- **Socio-Emotional** – Social and emotional health includes strong relationships with family and friends and being active and engaged in life. Exploring the lifestyle an individual wants as they age, where they want to live, who they want to socialize with and what they want to accomplish, is all part of the process.
- **Health Care** – Engaging people to think about their future health and personal care is an important part of late life planning. Supportive and compassionate care integrates a person's wishes for their health care, specific interventions, spiritual and cultural beliefs and advocacy.
- **Legal** – Legal documents are a part of late life planning. It includes sharing these with the people they trust, with those who need to be informed, and choosing who would make decisions on their behalf if they cannot.
- **Financial** – Engaging people to think about financial planning as they age or in times of change. Financial planning can help maintain a good quality of life as people age.

Building capacity and integrating late life planning into ongoing person-centred planning, BACI ensures that key elements are in place:

- Intake and planning are designed to guide relevant exploration based on the services each individual is accessing.
- Written materials, handbooks and other resources provided to individuals and families identify late life planning as an integral part of the planning we do with each individual and the important role it can play in supporting successful aging as defined by the individual.
- Employees receive information and appropriate training on late life planning with individuals and families served. This training follows the core principles outlined in this policy.

### **Policy Outcomes**

This policy is intended to ensure that:

- Person-centred planning with individuals includes an opportunity to explore and proactively plan for later life in ways that are meaningful to the individual.
- Employees are attuned to, and invite conversations about, late life planning with individuals and their families/personal networks as a routine part of our engagement.
- Planning is ongoing and reflects changes as the individual ages.
- Support for individuals as they age directly reflects their plans and wishes and is adapted as these plans and wishes change.

## Core Principles

These principles guide the approach to Late Life Planning:

- **Preparation is Key to Well-being as People Grow Older** – Early and ongoing planning for later life is widely considered an important predictor of people’s health, well-being and quality of life as they age. Successful aging is not measured simply by longevity, but more importantly by the individual’s opportunity to engage meaningfully in the areas of their life that are important to them.
- **Person-Centred Thinking/ Whole Life Planning and Quality of Life** – Person-centred thinking focuses on continuously learning and incorporating what is important to the individual for planning and support to adapt fluidly. Quality of life can change dramatically through the aging process. It is essential to use a person-centred thinking approach to stay attuned to these changes and avoid putting plans in place based on what the individual previously believed or wanted.
- **Self-Determination and the Opportunity for Choice and Voice** – Central to planning is the individual’s voice, in whatever form that it is expressed. A focus on understanding the individual’s preferences and what is important to them as their life starts to change.
- **Dignity and Respect** – Promoting equality is key to ensuring individuals are treated with dignity and respect. It is imperative that any potential biases, based on the individual’s disability or perceived vulnerability do not limit:
  - The assessment of an individual’s conditions and their access to treatments, and/or.
  - Their right to be involved in discussions/decisions about their care as they age or approach end of life.
- **Informed Choice** – Promoting self-determination allows time to help individuals and their families receive all the relevant information required. This includes information about both the benefits and risks involved in any potential decisions to be made about the individuals’ late life planning and end of life care.
- **Personal Network/Family Engagement** – Reduced activity coupled with changes in the level of engagement in community can make it more difficult for individuals to stay connected with loved ones as they or their loved one’s age. Late life planning should continue to nurture existing relationships, and continue to broaden these networks, to have a strong circle of people who matter to the individual. This circle will help provide support and advocacy, having people they know they can count on as they age.

## Linking Policies:

- 1.1 Vision & Mission Statements
- 1.2 Guiding Principles
- 1.3 Quality Assurance Policy

- 1.8 Code of Ethics
- 2.1 Accessibility Policy
- 2.2 Access to Service Policy
- 3.1 General Health & Safety Policy
- 6.1 Outcomes Management Policy
- 7.1 Individual Support Planning Policy
- 7.2. Personal Service Planning Policy
- 7.3. Individual Support Plans (Care Plans) Policy
- 7.4 Service Transition Policy
- 7.5 Adult & Youth Service Evaluation Policy
- 7.6 Personal Assistance Policy
- 7.10 End of Life Care Policy
- 7.11 Response to the Death of an Individual Receiving Services Policy
- 8.1 Privacy Protection for Individuals Policy
- 9.1. Rights & Responsibilities of People with Disabilities Policy
- 9.5 Involvement in Decision-Making Policy