



Professional Module: Creating a Life Plan

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Introduction

This easy-to-read module provides an introduction of what a life plan is and how to use it. After reading the module, dialysis staff will be able to:

- Help patients identify their personal goals and create life plans to achieve those goals.
- Recognize the difference between a patient care plan and a life plan.
- Understand how the plans complement one another to improve the quality of care and quality of life for people with kidney disease.

What Is a Life Plan?

A life plan is a set of targeted goals that details what an individual wants to achieve. These are personal goals that can be measured over time, short- or long-term. Life goals provide a roadmap for people to achieve the very things that mean the most to them as individuals, such as spending more time with family, going to college, and traveling around the country.



Why Life Plans Are Important

A life plan gives people a sense of control. Research shows that a sense of control can help reduce symptoms of depression and anxiety and even decrease mortality risk.¹ A life plan also:

- Keeps personal goals at the forefront of the healthcare plan and treatment options.
- Ensures that patient care plans are patient centered.
- Focuses on the physical, mental, and emotional needs of the patient.
- Clarifies important priorities and helps establish boundaries to stay on track to meet goals.
- Provides a written roadmap of what matters most to the patient.

The Difference Between a Patient Care Plan and a Life Plan

Life plans are built around personal goals, aspirations, and dreams. These goals can relate to things such as going back to school or work, volunteering for an organization, traveling to a place where someone has always wanted to visit, or spending time with and supporting family.

Creating personal goals empowers people to take charge of their lives while providing them with something for which to strive in their circumstances. Setting and achieving goals can also provide a sense of well-being and satisfaction when people meet or exceed the goals.

A patient care plan is a clinical approach to ensuring patients stay as healthy as they can with kidney disease. The care plan is an individualized approach to the treatment for kidney disease.

In many cases, the nephrology nurse, dietician, physician, and social worker will be the advocates of the care plan, while the patient will be the advocate of the life plan.

The care plan covers things like a patient's dialysis routine, modality choice, transitioning from in-center to home dialysis or receiving a transplant, medication management, renal diet, treatments for other health conditions, daily exercise, and social connections.

How to Support a Patient Starting a Life Plan

It's important to recognize where the patient is in his or her end stage renal disease (ESRD) and life journeys. The goals and plans of a patient who started dialysis six months ago might be very different than the goals and plans of a patient that has been on dialysis for two to three years. A patient just starting dialysis may not be able to consider a three- to five-year life plan. This patient's life plan may have more energy after dialysis treatments for six months, and that is okay. Including a care partner, friend, or family member can help the patient fulfill his or her personal goals.

Here are some common areas and goals that patients may want to include in their life plans:

- Health and well-being
 - ◊ Prepare healthier meals
 - ◊ Join a yoga or dance class
- Relationships
 - ◊ Spend more time with spouse or partner and/or extended family
 - ◊ Connect with friends
- Career
 - ◊ Go back to work
 - ◊ Earn a degree or return to school
- Community
 - ◊ Volunteer with a non-profit organization
 - ◊ Start or resume a hobby
 - ◊ Attend church and join activities
- Travel
 - ◊ Go to places that they have always wanted to experience
 - ◊ Visit with family and friends in distant locations

“I want to travel to places near and far and visit with family and friends.”

Creating a life plan takes personal reflection about goals and what a person wants to achieve. This is not an easy process, but it can be a fulfilling and rewarding journey. To help patients get started, staff may want to start with the sample questions below. Asking these questions helps remind patients of positive and successful situations in their lives. Recalling successful times can provide the self-motivation and empowerment needed to create goals and a plan to achieve them.²



Patients may want to see a new city!

- What is something you never thought you would do, but you did it? Why did you do it?
- Where have you lived, learned, and experienced your greatest successes, or the most joy in your life?
- When did you have to do the hard work to make something happen for yourself? What was it? What did you do?
- What motivated you to work so hard to achieve what you wanted?

Discerning Priorities and Understanding Values

Without a consistent focus on priorities, over time, personal goals will take second place to the obstacles and challenges that patients may face in living with kidney disease. Establishing priorities and knowing personal values help to keep a life plan on course to meet personal goals. Personal values have deep individual meaning. Below are examples of high-level personal values.

Unshakeable values (Friendships, family, faith, personal and professional boundaries)

Material values (Things that make life better like music, technology, entertainment, travel, sports, fashion, art)

Personal values (Integrity, trust, loyalty, honesty, kindness, empathy)

Developing a life plan can be challenging. The following scenario illustrates the steps to create a life plan. These steps can help the care team guide patients through the life planning process.

| | |
|---|---|
| Identify the Goal | Joe is an in-center dialysis patient. He has expressed interest in going back to work for his church on Monday, Wednesday, and Friday. |
| Prioritize the Future | On several occasions, he has told his social worker how much he misses supporting his congregation and being with people he has known for years. Joe is currently dialyzing in-center on the same schedule as the church work schedule. |
| Create an Action Plan | As the social worker, you discuss dialysis options with Joe, including doing home dialysis. You explain that by doing home dialysis, Joe will have flexibility to dialyze when he wants and will not have to wait for a chair to open on the Tuesday, Thursday, Saturday dialysis shifts. |
| Monitor the Progress and Celebrate Success | After a couple of weeks, Joe brings up dialyzing at home and would like to learn more about it. You review home dialysis options with Joe and help him create a care plan to transition to home hemodialysis. Each week, Joe continues to progress through the home hemodialysis training. Finally, Joe is ready to do dialysis at home. After about two months of adjusting to home hemodialysis, he has achieved his life plan goal of working at his church. |

Why Writing It Down Matters

Committing goals in writing offers the individual the chance to reflect on what he or she wants to accomplish. Writing down goals provides a foundation for commitment to achieve them. Here are five additional reasons to write down goals³:

1. Clarifies what the person wants
2. Motivates the person to act
3. Helps prioritize the goal from other opportunities
4. Helps the person push through resistance to take action toward the goal
5. Enables the person to see and celebrate his or her progress

Dialysis staff members can encourage patients to write down their personal goals. One of the best ways to track goals is to keep a journal. A journal, such as the ESRD NCC patient resource, *Goal Setting: Getting Back to Me*, enables the writer to go back to previous entries to review his or her thoughts and ideas. This helps to clearly define goals and create a plan to achieve them.

Change Is Inevitable

A life plan is always changing because life circumstances are ever changing. Staff can help patients understand that when they are sure of goals they want to accomplish, they should pursue them with passion and determination, regardless of whatever life changes they encounter. Should they lose interest in the goals, it could be a sign that it is time to reevaluate the goals. That is okay! Patients may have new goals that take priority over the current goals. Discussions with patients should include the importance of considering whether or not personal goals are still important to them. Staff can offer encouragement to patients to reevaluate and modify the goals or even remove them from their life plans, either temporarily or permanently. Doing so will help make room for new goals.

Conclusion

There are many benefits to creating a life plan. Perhaps the greatest benefit is when patients create balance between their care plans and their life plans. This balance helps to ensure that every part of their lives gets equal amounts of time and attention and helps promote hope and joy for people looking to thrive with kidney disease.

References

¹Harvard Business Review. How to plan your life when the future is foggy at best. February 11, 2021. Available at: <https://hbr.org/2021/02/how-to-plan-your-life-when-the-future-is-foggy-at-best>. Accessed August 2, 2021

²BetterUp. How to excel at life planning (a life planning template). Available at: <https://www.betterup.com/blog/life-planning-published-june-10-2021>. Accessed August 5, 2021.

³Michael Hyatt & Co. 5 Reasons why you should commit your goals to writing. July 22, 2019. Available at: <https://michaelhyatt.com/5-reasons-why-you-should-commit-your-goals-to-writing/>. Accessed August 4, 2021.