

Brief Action Planning Skills Checklist

Version: 1 May 2018

Name: _____

Date: _____

Assume rapport was established before the interaction started.

A = Achieved; **D** = Developing; **NA** = Not

Applicable

Item	Description	A	D	NA
Question 1	"Is there anything you would like to do . . . in the next week or two?" is asked clearly and respects the person.			
Skill 1: Behavioural Menu	Behavioural menu is used when the person doesn't have any ideas, doesn't know where to start, or requests ideas.			
	1. The helper asked permission to offer a Behavioural menu.			
	2. The helper offers two or three brief, but not too specific ideas together in a list without pauses. The list has variety (i.e., not all are scheduled programs, only diet if it is a weight loss concern, or only abstinence related, etc.)			
	3. The helper asked the person if they had any ideas of their own as the last item on the list.			
Skill 2: SMART plan	The helper completed SMART planning (What, When, Where, How often, How much, How long, Start date) IF the person was willing.			
Skill 3: Commitment Statement	The helper asked the client to say back their plan.			
Question 2	The helper asked confidence (how sure) level clearly with a description of what confidence and the numbers mean or provided a culturally appropriate alternative.			
	The helper responded positively to the person's confidence level and if the confidence level was below 7, explained the reason for a confidence level of 7 or above.			
Skill 4: Problem solving for low confidence	The helper assisted using problem solving if confidence was less than 7.			
	The helper asked for the person's own ideas first.			
	If the person didn't have their own ideas, a three-part behavioural menu (see above) was offered.			
	The helper asked for the commitment statement and confidence level again after the plan if the plan was altered. (the commitment statement is not required, but recommended)			
Question 3	A check on the progress or accountability plan was made.			
	The plan was clear, specific and determined by the person. (with whom, how, when)			

Checking on the Plan:

Item	Description	A	D	NA
Skill 5: Check on progress	The check on the progress of the plan began with an open-ended question.			
	The helper responded positively, no matter what the results were.			
	The helper asks an open-ended question to determine what the client wants to do next, and their preference is honoured.			

Overall Items:

Item	Description	A	D
Warmth and Tone¹	The tone is warm and encouraging, and the person does most of the talking. There may be statements of encouragement such as “that sounds like a plan that will work for you,” and the helper does not use language or statements that reinforce an ‘expert’ role.		
Structure	The items occurred in the order that they appear on the checklist.		

¹ The Spirit of MI (compassion, acceptance, partnership, and evocation) is built into the BAP skills. But words are not enough. The tone of the interaction indicates how well the support person demonstrates caring and genuine interest.