

## Using BAP in Groups

Version: 1 May 2018

### What this document will do for you

This is designed to help Brief Action Planning (BAP) practitioners use BAP in group settings such as group medical visits, education classes or peer-led support groups. It contains the things to consider that will happen before, during, and after using BAP in a group.

The supporting documents can be downloaded from the CCMI website. <https://centrecmi.ca/brief-action-planning/>

### Materials for supporting BAP in groups:

- “Things I Want to Try” (a worksheet given out at the start of meetings to help participants track ideas)
- “Taking Care of My Health or Well-Being” (a BAP Planning Worksheet to help guide participants in the planning process)
- “Checking on My Plan” (a worksheet for participants to take home if they will not be checking in with you)
- You may want to have extra pens and something for participants to write on in their laps

### Things to consider before the group

1. Decide if BAP is right for the group
2. Get permission to include BAP
3. Determine check in support and responsibility, if any

### Things to consider during the group

4. Explain BAP to the group
5. Facilitate BAP with the group

### Things to consider that will happen after the group

6. Determine check in details

## Before the Group

### 1. Decide if BAP is right for the group

BAP can work in virtually any group that might incorporate planning or next steps as part of the agenda. BAP is particularly useful if the group meets to share information or receive education. Sometimes it is difficult to receive large amounts of information and imagine how to apply pieces of it to our lives. Using the “Things I’d Like to Try” worksheet can help your participants keep track of ideas that appeal to them throughout the meeting, and then they already have ideas that may work for them when the time comes for BAP.

BAP is also great for support groups and any other group that encourages self-management or self-care. It is useful in any group where you would like to support the development of the participants’ self-efficacy.

### 2. Get permission to use BAP in a group visit

You may want to use BAP in a group visit that isn’t “yours.” You may not be the leader or you may be visiting for a single meeting in a series that someone else organizes. Find out who is in charge of the group agenda, content, and time allocation.

Ask if they are willing to let you include BAP. You may need to talk about:

- Using 15 – 20 minutes of meeting time for BAP if you are not demonstrating BAP with the group or 20 – 30 minutes if you are (more on this below).
- Be aware that goal setting can lead to valuable group discussion, which may expand the time.
- The value of setting aside time to move from giving information to planning action. If they are used to having the whole time to deliver education, they may see planning time as time ‘taken away’ from education. You may need to explain why it can be useful.
- Any responsibility they may be assuming for follow up, checking in or adding the results of plans to their records if this is a group medical visit.

BAP usually comes at the end of a meeting but don’t add extra time onto a meeting for it. If the meeting usually goes from 7 – 8:30 make sure you keep to this and don’t ask participants to stay till 8:45 so you can do BAP. Smaller groups may be faster and larger groups may be slower.

### 3. Determine check in support and responsibility, if any

Think about how participants will check in with their plans. Will you see the group again and be able to check in with them? If this is a group medical visit and participants are willing, will it be entered into an Electronic Medical Record? Is this an ongoing series, and is the coordinator willing to offer themselves for check in the next time they meet? Is it a one-time thing and participants will need to check in on their own?

Of course, participants can choose anyone they want to check in with, regardless of the circumstances of the group. But if someone from the program will be offered as an option (the coordinator, their GP, the nurse, the leader) then make sure this person understands the spirit of the check in which is about learning, not looking for failure or success. Introduce them to the “Checking on my plan” worksheet and

the question guide on the back of it. Make sure the person is comfortable helping participants learn from partially completed plans and won't take over with problem solving.

If participants choose to or need to check in with family, friends or someone else not trained in BAP, make sure they have the "Checking on my Plan" worksheet and that they understand the spirit of the exercise. It is to learn, not to look for reasons to think they failed!

### **During the Group**

#### **4. Explain BAP to the Group**

Have a few sentences that summarize what BAP will do for them in your own words (for example: BAP will help you take something you have learned, or anything else you have been wanting to do, and make it into a plan you can achieve. You can plan a check in too, to give you extra support and encouragement. Making a plan is totally optional).

Always explain these three things:

- Making a plan is optional.
- It doesn't just have to be about something discussed in the group.
- No one has to do it who doesn't want to.

If you are comfortable and have the time, you can demonstrate BAP with someone who is willing. Try asking "Who here has an idea of what they would like to try and would be willing to make a plan with me now? It will help everyone learn." This is more time consuming, but if this is a group that meets regularly and will use BAP again it may be worth creating deeper understanding.

You can also walk through the BAP worksheet with them to explain how BAP will work.

#### **5. Facilitate BAP with the group**

If you have used a demonstration of BAP to explain it or have not shown them the worksheet, you will walk them through it now. Always show participants the document start to finish before asking them to begin.

You may want to have them complete it in "chunks" to catch any confusion or offer any help. Have them complete a chunk on the worksheet, check in for any questions, explain the next chunk and have them proceed. If anyone is stuck, or asks "What do you mean?" remember your Behavioral Menu skills!

You can divide this so it works for you and for your group, but check in enough that you are sure the group "gets it." As you work through the chunks you may want to ask participants if they are willing to share their ideas or plans, which may help other participants find inspiration or understand the process.

The chunks could be:

1. Picking an idea to try and making a SMART plan. You can then check in to see if the plans have the needed details, especially a start date.

2. Confidence Level. When they have chosen one, you can offer the information that confidence higher than a 7 is a strong indicator of success. You can invite them to adjust the plans to increase their confidence.
3. Plan adjustment.
4. Plan re-statement. You can check in to make sure everyone who needs to has re-written the plan. Explain that restatement creates ownership and increases likelihood of success.
5. Plan for checking in. You can give them the Checking on the Plan worksheet and make sure they understand the purpose and spirit of checking in.

Watch for participants who may be struggling with literacy as they work on the worksheets. If you suspect it is an issue, you could offer to do it out loud with anyone who would like to or offer a little more one-on-one help if you are able to.

Be wary of scheduling so that participants need to finish their plans at home on their own. The support of the group to finish the process is important.

### **After the Group**

#### **6. Support for the Check in**

You will have decided what support you will offer participants for check in before you make plans. Your plan may be to have participants manage their own check in or there could be a clinic EMR that will hold the plan for a physician to do the check, if the participants want that. It is always a good idea, and aligned with the Spirit of MI, to ask the participants if they have any ideas that might improve the effectiveness of checking on the plans for them. They may choose a family member or friend.

Checking on the plan helps participants complete the plan and learn from it. Make sure you do not let it slip away! If you won't see participants again, use the provided Checking on My Plan worksheet to help participants make a concrete plan for a check in that will help them succeed. Have them make a plan to check in with themselves or someone else before they go. The questions to guide the check in are on the back of the "Checking on my Plan" worksheet.