

# Planning Document Instructions

When negotiating with another person, it can be hard to think on your feet. Planning ahead helps! Completing this activity can help you feel prepared.

The instructions and example below show a conflict between a caregiver and a loved one.

## 1 First, state your goal.

What is the OUTCOME you want to happen?

- **Tip:** You may have multiple goals; list them all. To get the negotiation going, it may be easier to start with one goal versus another.

## 2 Go to the Caregiver column.

What is your INTEREST? Why is your goal so important?

- **Tips:** This is the “Why?” Why does your goal matter to you?
- Identify the interest behind the goal. This is important because there may be many ways to get to the same goal.
- Resolving the conflict is going to come by addressing the loved ones interests in a way that also addresses yours, not by addressing your interests alone.

What are your RIGHTS? These are your standards, values, and ideals.

- What arguments can you use to support your goal?
- **Tip:** Your arguments are not likely to resolve the conflict, but you need to know what they are.

What is your POWER?

- What authority do you have to resolve the conflict or make the change? What are your options if you cannot get your interests met?

Goal	Caregiver	Loved One
Get Dad to stop driving.	Interest (“The Why”)	
	I am worried that Dad is having trouble seeing, physically impaired and may get in an accident.	Dad wants to maintain his independence, he does not want to be a burden on others.
	Rights	
	I am responsible for caring for Dad.	Dad is able to make his own decisions.
	Power	
	I won't bring the grandkids over if he refuses.	Dad will write us out of will.

## 3 Go to the Loved One's column.

State your loved one's GOAL. Put yourself in their shoes: what do they want to happen?

- **Tip:** The loved one probably does not want any change. To get change going, it may be easier to start with a something that is not so important to them.

Move to the loved one's INTEREST. Why are they resisting change? What are their concerns?

- **Tip:** Think hard about this! Understanding what is stopping them from making the change you want is key to coming up with a creative solution.
- Change is going to come by addressing the older adult's interests in a way that also addresses yours, not by addressing your interests alone.

Move to RIGHTS. What arguments are they making?

- **Tip:** You are unlikely to accept their arguments, but you need to anticipate them, so you can respond constructively.

Move to POWER. What authority do they have? What are their options if you cannot reach an agreement?

- **Tip:** The loved one may make all kinds of threats. Anticipating their threats in advance, helps you respond constructively.

Goal 1	Caregiver (you)	Loved One (person you are negotiating with)
	Interest ("The Why")	
	Rights	
	Power	

Goal 2	Caregiver (you)	Loved One (person you are negotiating with)
	Interest ("The Why")	
	Rights	
	Power	

Goal 3	Caregiver (you)	Loved One (person you are negotiating with)
	Interest ("The Why")	
	Rights	
	Power	