



# PLANINJ

## The Challenge of Providing Quality Services for the Life of the Beneficiary

Stetson University SNT Conference 2025

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### Agenda

- Serving people with disabilities: shared mission, purpose, values
- Lifetime support services: who needs them? Should PSNT's offer them?
- Quality Services: Do PSNT priorities differ from other service providers for people with disabilities?
- Standards for quality service provision



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### About PLANINJ

- Statewide non-profit organization
- Established in 1988
- Member of the National PLAN Alliance (NPA) and Alliance for Pooled Trusts (APT)

THE PLANINJ MISSION is to help families answer the question:

**“Who will care for my loved one when I’m gone?”**



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## Advocacy: Removing Societal Barriers

*"Disability only becomes a tragedy for me when society fails to provide the things we need to lead our lives—job opportunities or barrier-free buildings, for example. It is not a tragedy to me that I'm living in a wheelchair."*

Judith Heumann

Disability is not a health problem but a complex interaction between individuals and social/environmental barriers: World Health Organization (WHO) World Health Report on Disability 2011



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## What is Quality of Life? Vision Statements Guide Practice

- Vision: Center for Disability Rights New York (cdrny.org) (also a PSNT) - A society in which people with disabilities enjoy full integration, independence, and civil rights.
- PLAN/NJ envisions that all people with disabilities have
  - A safe and appropriate place to call home
  - Financial stability and security
  - Suitable and appropriate education
  - A challenging and rewarding place of employment
  - A fulfilling network of support
  - Participation as a contributing member of the community
  - The ability to have choices and personal control



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## Service Time Frame: Life of the Trust or Life of the Beneficiary?

### • PARTNER SHARE

- What services does your PSNT offer in addition to trust administration?
- Why do you offer these – or why not?
- How do you assist clients to access needed services?



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### Medical Model vs Social Model

|                                                  |                                               |
|--------------------------------------------------|-----------------------------------------------|
| Person has special needs                         | Person has human needs                        |
| Person should adjust to fit into society         | Society should adjust biases/ barriers        |
| Person needs to be cured/fixed                   | Person has equal rights- is not broken        |
| Person is an object of charity                   | Person is empowered                           |
| Person has little say in decisions made for them | Person has right to autonomy, choice, consent |
| Does not take a holistic approach                | Takes a holistic approach                     |

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### Personal Choice and Quality of Life

*"Independent Living is a psychological idea much more than a physical concept. I'm paralyzed from the neck down, but I am completely in control of my own life. I make decisions about what I want. And when you begin to believe that it is very empowering and powerful."*

Ed Roberts Activist, pioneer in disability rights and independent living movement



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Ed Roberts: Activist, pioneer in disability rights and independent living movement



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### Disability is Not Temporary: Lifelong vs Time Limited Services

- Recognizing the roles of families and caregivers; promoting planning and stability
- Reducing gaps and system failures
- Advocating for equity and human rights:
  - Promoting self-determination
  - Affirming opportunity, support, inclusion
  - Empowering people to lead meaningful lives



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### Service Length: Life of Beneficiary or Life of Trust?

#### PARTNER SHARE:

- Who employs case managers / social workers? Why or why not?
- Who offers future life planning services to families?
- Who uses pooled trust remainder funds to pay for social service and advocacy needs? Provided by in-house or contracted services?



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### Mission, Vision and Values Define Quality Services

- **Mission and Purpose:** why the organization exists; clear intent and focus
  - What the organization does; for whom; how; what needs are addressed
- **Vision:** unity, inspiration, organization culture
  - Grounds the work in meaning - builds trust, accountability, credibility
  - Guides decision making and strategy
  - Promotes advocacy and education



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## The Quality Movement

*"Customers may forget what you said but they'll never forget how you made them feel"*

Maya Angelou



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## The Quality Movement

• *"Quality in a service or product is not what you put into it. It's what the customer gets out of it"* Peter Drucker

• *"You can't improve what you don't measure"* W. Edwards Deming



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## Standards of Practice: Quality Metrics to Measure

- Guidelines for Pooled Trusts v4: 2025  
<https://nationalplanalliance.org/resources/>
- Life Passages PSNT Best Practice Guidelines <https://Stetson/elder-justice/media>
- National Guardian Association Standards of Practice  
<https://www.guardianship.org/standards/>



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## Quality Indicators: Use Measurable Benchmarks

- Efficiency, Effectiveness, Impact, Outcomes
- Staff training and performance
  - Staff to beneficiary ratio
- Quality service delivery
  - Timeliness, accuracy, professionalism
  - Continuous Improvement
- Transparency, Accountability, Compliance
- Risk Mitigation



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## Purpose, Mission, Vision

### • PARTNER SHARE

- How does your org's purpose differ from those that offer lifelong supports? Why?
- Why was your organization established? What is your organization's mission and purpose?
- What needs do you address and how do you address them?



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## Staff Are Key In Quality Service Delivery

- Retention strategies
  - Compensation
  - Salary, benefits
  - Recognition
    - acknowledgement
- Culture
  - performance reviews
  - team building activities



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## Mission, Vision, Values

- **Essential tools for leadership, communication and impact**
- Person centered services, person first language; circles of support
  - Empowering people; advocating for rights
  - Building a more inclusive society
- Food for thought
  - What values and principles guide your work?
  - What services would you offer if you had the resources, time, money?
  - What are your aspirational goals?



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## FOR MORE INFORMATION CONTACT: Planned Lifetime Assistance Network of New Jersey

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