Direct Support: Person-Centered Planning
Course Transcript

Course Title: Welcome to this course on Direct Support: Person-Centered Planning.

Course Introduction: This course presents:
- An overview of person-centered planning.
- A variety of thinking tools that can be used to help structure person-centered planning.
- Four common approaches to person-centered planning including Essential Lifestyle Planning, Personal Futures Planning, Making Action Plans (MAPs), and Planning Alternative Tomorrows with Hope (PATH).
- Strategies to facilitate person-centered planning meetings.

Course Objectives: After completing this course, participants should be able to:
- Comprehend the basic characteristics of person-centered planning and how it differs from traditional planning methods.
- Recall thinking tools that can be used to help structure person-centered planning.
- Identify four common approaches to person-centered planning.
- Recall strategies one can use to facilitate person-centered planning meetings.

Key Words: This is a list of key words that are found within the course.

- **Circle of Support** - Committed group of people who care about an individual and desire to develop and provide the support an individual needs to achieve their plan such as family members, friends, advocates, support professionals, and other community contacts.

- **Essential Lifestyle Planning –** Support-based planning approach which guides an individual to determine how, when, and by whom support is provided so they can live the life of their choosing.

- **Making Action Plans** – Future-oriented planning tool that starts by getting to know the individual and their dream and then forming an action plan for accomplishing that dream.

- **Personal Futures Planning** – Planning method which begins with the creation of a personal profile to discover capacities an individual can use to contribute to their community and the supports they need to do so.

- **Person-Centered Planning** - Action-based planning method which works to discover what an individual wants out of life so the supports they need to achieve their dream can be provided in the manner they choose.

- **Planning Alternative Tomorrows with Hope** - Future-oriented planning method that starts with the dream in mind and works backward to determine the supports and strategies needed to achieve that dream.

- **Self-Directed Support** - The individual decides how, when, and by whom support is provided.

- **Service-Centered Planning** - Support professionals and service providers direct how support is provided to individuals with disabilities and the focus is on the service systems provided.

What is Person-Centered Planning?
- Action-based planning method that works to discover what an individual wants out of life so the supports they need to achieve their vision can be provided in a personalized manner.

Person-Centered Philosophy:
- Everyone has the ability to contribute to their community as a valued member of society.
- The individual knows their needs and desires best.
- Embraces the principles of independence, self-determination, equality, inclusion, and empowerment.

New Way to Look at Support Planning:
- Service-Centered Plans:
  - Focus   on disabilities and deficiencies
  - Fit individuals into existing support systems
  - Place authority with support and service professionals
  - Employ standardized activities for larger groups of individuals
- Person-Centered Plans:
  - Focus on strengths and abilities
  - Form unique, individualized support plans
  - Place authority with individual and their Circle of Support
  - Emphasize independence, self-determination, and community participation

Major Objectives:
- Empower individual with choice, independence, and community inclusion.
- Celebrate individual's strengths and talents.
- Increase individual's satisfaction by incorporating self-directed support.
- Build a Circle of Support around individual.
- Find a common language the individual and their Circle of Support can use to communicate.
- Learn to listen to the individual to discover who they really are and what they desire out of life to assist them in accomplishing their dream.

What is a Circle of Support? Everyone a person might need to assist them in achieving their plan including family and friends, support professionals, advocates, and mentors throughout the community.

How well do you know those you support?
- Are you familiar with their cultural background?
- Do you know their interests and what is important to them now and in the future?
- How do they best communicate?
- What are their abilities and strengths?
- What do they want out of life?
- What are their hopes and fears?
- How do they wish to be supported?

Person-Centered Thinking Skills:

- Start by focusing on individual's strengths, interests, desires, and abilities rather than assessing what they are unable to do.
- Discover what others admire about them.
- Learn to communicate with them to discover how they want to live now and in the future.

Benefits:
- Individuals learn to express themselves, build self-respect, and practice interpersonal skills.
- Can achieve real positive changes in individuals' quality of life, their abilities, and their role within the community.
- Helps individuals build a vision for their future and determines the steps required to get there.
- Results in action plan that reflects the unique interests of the individual and the unique characteristics of the local community.

Challenges:
- Time-consuming, continually adaptive process that requires building bridges within the community.
- Individuals may have difficulty communicating, making decisions, or may exhibit challenging behavior.
- Remembering to keep individual at center of the planning process especially when their lifestyle choices differ from those supporting them.

Personalized Support:
- What is important to the individual?
- How do they communicate and make decisions?
- How does the individual desire support be provided?
- Is the individual satisfied with the support being delivered?

Role of the Direct Support Professional:
- Learning how best to communicate with individual and their Circle of Support.
- Advocating for individual and keep them the center of focus.
- Maintaining positive outlook and vision of inclusion and independent living.
- Learning to listen well, practicing creative problem-solving, assisting with decision-making.
- Building bridges within the community to maximize resources.
- Monitoring plan to ensure effectiveness.

Power Shift:
- Circle of Support provides guidance from the side with the individual center stage.
- Personalized plans are co-produced by individual and their Circle of Support in a language accessible to everyone.
- Individuals move from being objects of support to contributing members of their community.

Community Interdependence:
- Use person-centered planning to seek the resources needed to maximize an individual's potential. Support the individual to move from dependence, to independence, and ultimately to interdependence within his or her community. Everyone has something to contribute to their community. Individuals with disabilities have the right to choose how the support they receive can assist them in contributing to their community.

Activity: In this activity, please select the correct response and click Submit.

- Person-centered planning is characterized by all of the following except:
    - A Circle of Support is formed around the individual
    - A communication style is used which is accessible to all
    - **Decision-making is undertaken by service professionals**
    - Individual directs how support is provided

Variety of Thinking Tools:
- One-page profile
- Communication chart
- What is working and what is not
- Important to/important for
- Matching support professionals
- Relationship circle
- Circle of Support

One-Page Profile:
- Helps organize and share information about an individual.
- Quick reference guide used throughout community to get-to-know the individual, provide the supports they desire, and enhance communication.
- Different sections can be included in the one-page profile depending on the priorities of the individual. These sections can include:
    - What people like and admire about me
    - What is important to me
    - How I communicate
    - How to best support me
    - My history or background
    - What makes a good day and what makes a bad day.
    - My daily routine.
    - What is working and what is not.

Communication Chart:
- We all communicate differently and individuals with disabilities are no exception. A communication chart focuses on how an individual communicates whether they use words or not. Often an individual's actions communicate their message more clearly than words. The communication chart can be used to describe an individual's behavior and apply meaning to it so they are more easily understood. The chart includes the message behavior, what the intended message might be, and possible responses to use.

What is Working/What is Not?
- The "what is working, what is not" sorting tool analyzes all parts of an individual's life to determine what to build on and what to change. It incorporates the perspectives of all planning team members so any issues can be discussed. It is a good tool for providing a picture of how things are right now. What is working, what is not helps to point out progress, determine everyone's satisfaction, and work to fill gaps in an individual's support plan. The next step is to determine why something is not working and what actions are needed to improve success?

Important To/Important For:

- The "important to, important for" sorting tool works to find a balance between what is important to or what makes the individual happy, fulfilled, and content from what is important for them to remain healthy, safe, and valued in their community.

Matching Support Professionals:
- The "matching support professionals" tool helps determine what supports the individual desires, skills the support professional should have, the ideal personality characteristics, and shared interests an individual desires in a support professional. This person-centered thinking tool evaluates the individual's ideal support professional so the best candidate can be found or a current support professional can learn how they can adapt to provide personalized support.

Relationship Circle:
- The relationship circle helps identify who is important to the individual, who cares about them, and who might make up their Circle of Support. It also identifies relationships that might need to be reconnected, protected, or strengthened or where additional relationships might need to be formed.
- The inner circle is for those who are closest to the individual. People who see them every day and share a close bond. The second circle is for those who interact with the individual on a regular basis. The outer area is for those who the individual knows and finds meaningful but contact is limited.

Circle of Support:
- An individual's Circle of Support includes everyone a person would need to assist them in achieving their plan including family and friends, support professionals, advocates, and mentors.
- The individual invites people they feel comfortable with, whose opinions they value, who have the ability to guide and support them, and who are committed to the individual's plan. They are companions who share a vested interest in the future success of the individual.
- Most Circles of Support meet regularly at a comfortable place and at a convenient time. Direct support professionals, family and friends, other service professionals and anyone else who the individual desires to participate work together to explore, problem-solve, and provide supports needed to accomplish what the individual desires. Everyone involved should work to be the best listeners, learners, facilitators, and organizers they can be.

Activity: In this activity, please select the correct response and click Submit.
- Karen has a learning disability and does not use words to communicate. Sometimes she becomes extremely upset, yells, and bangs on things while staring at an object. The DSP supporting her noticed that moving the object she stared at calmed her down and realized that Karen gets irritated when things are out of place. Which person-centered thinking tool can be used to help others understand help respond to Karen's behavior?
    - o What people admire about me
    - o **Communication chart**
    - o My hopes and fears
    - o What is working and what is not

Four Common Approaches:
- Four common person-centered planning approaches have been developed to guide the planning process.
    - o Essential Lifestyle Planning achieves self-directed support for individuals with high needs or those going through life transitions.
    - o Making Action Plans (MAPs) spends a good amount of time "getting to know" the individual and forms a very visual plan of action to avoid their fears and achieve their dream.

- Personal Futures Planning is describes what the individual's life is like now and discovers strategies to achieve their ideal future as a valued member in the community.
- Planning alternative Tomorrows with Hope PATH is a group visualization process that builds a tension between the individual's current reality and their dream or "north star" to create an plan of action.
- We will know discuss these approaches in more detail.

Essential Lifestyle Planning (ELP):
- Essential Lifestyle Planning is the only approach we will discuss which focuses on the present and not the future. It is used to determine the essentials an individual needs to be satisfied at home, at work, and in the community. It is very effective in forming self-directed support and assists in balancing an individual's lifestyle choices with their health and safety. ELP works to improve people's quality of life on a day-to-day basis.

Steps in Essential Lifestyle Planning:
1. What people like and admire about the individual: Maintains positive focus and celebrates their gifts while sharing others' perspectives.
2. What is most important to the individual including favorite places to go, activities/hobbies, work/volunteering/meaningful activities, comforting things, people they like to visit, routines
3. What makes a good day and what makes a bad day. The individual's best and worst day are described so it is clear what should be avoided in their daily routine and what should be built upon.
4. What is their learning style?
5. How do they communicate?
6. How best to support the individual (during meals, around the house, medical and health related tasks, when they get upset, with transportation, appearance, and money management.)
7. Describes Things to figure out, a running list of issues to be addressed, questions to be answered
8. Action items can be used to address each issue from step 7.

When Essential Lifestyle Planning is Useful:
- ELPs are very detailed accounts of the essentials an individual needs to be satisfied on a daily basis and thus are very helpful in
- Getting to know the individual and developing a planning team around them
- Guiding new support staff to provide personalized support.
- Offer stability during life transitions
- To increase the quality of life for individual's with high support needs

Making Action Plans (MAPS):
- MAPS focuses on really getting to know the individual so an accurate plan that builds on their strengths, fulfills their needs, and avoids their fears, and envisions their dream can be created. It begins with a look into the individual's past in order to learn how they got to where they are today and ends with action items for each member of the planning team.

Steps in Making Action Plans (MAPS):
1. **History**: The process begins with a detailed account of the individual's past. Life milestones are documented as pictures or words to describe events impacting the individual's life. As the group learns the individual's life story, they can become more involved in planning their future.
2. **Dream**: Exploring the individual's dream lays the foundation for the final action plan. Start by asking the individual what they would do if they could have anything they want. Some interpretation may be

needed if ideas are a little far-fetched. For example, if someone wants to be a superhero, it may mean they wish to be strong, brave, and help others.

3. **Fears**: Determining fears discovers what the individual desires to avoid in life. If the dream gives the team something to work toward, their fears provide what to work away from.
4. **Identity**: Descriptive images are used that form the individual's identity. Their strengths, likes, dislikes, personal qualities, favorite activities are detailed to form an accurate account of who they are.
5. **Strengths**: What do they do well? This section celebrates the individual's capacities, skills, gifts, talents and helps determine what they can contribute to their community.
6. **Needs**: What is needed in the form of people and resources to achieve the dream? Needs might include job exploration, skill development, exploring independent living options, or involvement in community activities.
7. **Plan of Action**: After revisiting the information obtained in the previous steps, the team creates specific steps of action that everyone will take to mobilize the plan. This step determines who will do what by when?

When Making Action Plans is Useful:
- Getting to know an individual
- Displaying plan graphically
- Charting steps toward a positive future

Personal Futures Planning:
- Focuses on how individual can contribute to the community.
- Matches strengths and abilities to community opportunities.
- Requires a dedicated planning team who knows the individual well.

Steps in Personal Futures Planning:
1. **Explore relationships**: A relationship circle is used to determine those involved in the individual's life. This step helps to form a Circle of Support and locates valuable contacts for helping to achieve the vision.
2. **Discover strengths and abilities**: The next step builds a personal profile for the individual with a focus on their skills, gifts, and talents. In addition to collecting information on their background, preferences, and interests, it details their accomplishments and obstacles they worked to overcome.
3. **Explore community opportunities**: Keeping the individual's strengths and abilities in mind and using their interests as a guide the group brainstorms potential opportunities throughout the community. Events, activities, special interest groups, and any other meaningful activities are discussed as possible avenues.
4. **Create vision for the future**: Everyone shares their vision of the individual's future. What living arrangements, education, job situations, friendships, and recreation do they envision?
5. **Support taking action and trying new things**: Action items are formed in line with the vision and members agree to implement the supports needed to achieve them.
6. **Evaluate and reorganize supports**: The plan is evaluated and reorganized as needed. What obstacles are preventing the group from achieving it's goal? Where are additional supports needed? What is working and what is not? The group brainstorms solutions for organizational change.

When Personal Futures Planning is Useful:
- Planning team knows the individual well
- Individual desires community participation and social interaction
- When relationships need to be developed

Planning Alternative Tomorrows with Hope:
- Group visualization process resulting in a graphic record of plan
- Starts by developing a dream or "north star" and sensing what it feels like to have accomplished it
- Builds tension between current reality and dream

Steps in the PATH Process:
1. **Touching the Dream:** (the "North Star"): The dream or "north star" where the individual describes their ideals, identity, values, and desires for the future. The dream provides direction for the group.
2. **Sensing the Goal:** After the dream has been identified, the next step is for the group to sense the goal. What does it feels like to have reached the dream? What is different? How did we get here and who helped? How long did it take? And who helped?
3. **Grounding in the Now**: Next, the group focuses on the individual's present reality. How does the individual feel today? What is their current reality? This step helps the group to start thinking what will be needed to get from now to the desired future.
4. **Identifying People to Enroll**: The group then brainstorms a list of people who can commit to the individual's dream and what role they might play in the process. People or organizations that will move the process forward and strategies to get them on board are discussed.
5. **Recognizing Ways to Build Strength**: This step involves determining the resources everyone will be need to keep them strong and support their efforts in working toward the dream. How can the team improve their skills, relationships, and knowledge? What is needed to remain happy and healthy along way?
6. **Charting Action for the Next Few Months**: This step helps to determine the actions that will happen in the next few months. What initial actions will need to occur in the next two to three months to get the team off on the right foot?
7. **Committing to the First Step**: The final step involves identifying the first step and organizing who will be responsible for what and by when.

When PATH is Useful:
- Planning team already knows the individual
- Individual has a good sense of where they want to go but need help getting started
- Graphic account of the plan is desired

Activity: In this activity, please select the correct response and click Submit.
- Which person-centered planning approach works to match an individual's interests and abilities to opportunities within the community?
  - Making Action Plans (MAPs)
  - Planning Alternative Tomorrows with Hope
  - **Personal Futures Planning**
  - Essential Lifestyle Planning

Characteristics of a Person-Centered Meeting:
- The individual is the focus
- Participants respect, care for, and are committed to the individual
- Communication is open, positive, and reflects the language and style of the individual
- Everyone engages in continual listening and learning
- Individual has final say over content used

Set Ground Rules:
- One of the first strategies the group should do is to set ground rules everyone can agree on.

- Examples of ground rules are:
  - No judging
  - No jargon
  - Do not cut others off when they are speaking
  - Build on other's comments
  - Start on time, end on time
  - Follow through on action items
- Keep ground rules visible during meetings.

Consider the Following When Planning a Meeting:
- Where is a comfortable, convenient location?
- What time of day works best?
- Who should attend?
- Who will the facilitator be?
- How can the individual best participate?
- What materials will be needed?

Maintain Positive Environment:
- Because person-centered planning is a visualizing process it is important to maintain a positive environment where creative brainstorming can thrive. A positive environment is one where:
- There are no wrong answers
- Members build on each other's ideas
- Members build trust confidentiality and do no harm
- Creativity is encouraged
- Conflict is resolved constructively

Evaluate Team's Progress:
- Evaluate the team's progress by asking the following questions:
  - Are action items from meeting achieved?
  - Is it achieving the plan's purpose?
  - Is the group continually trying new things and assessing their progress?
  - Is the individual satisfied?
  - What could be tried differently to achieve more?

Bringing the Meeting to a Close:
- A good closing exercise is for each team member to share something they learned about the individual from the process. The team then decides on the date and time of the next follow-up meeting.
- Everyone shares something they learned about the individual from the process.
- Any questions or areas of ambiguity are addressed.
- Ensure everyone knows what they need to do by when.
- Team decides on the date and time of the next follow-up meeting.
- Materials are copied and dispersed.

Activity: In this activity, please select the correct response and click Submit.
- Individuals who do not use words to communicate are unable to participate in person-centered planning meetings. **False**

Summary:

- Person-centered planning focuses on strengths and abilities and facilitates self-directed support.
- There are a number of thinking tools to assist with the person-centered planning process.
- The Direct Support Professional plays an important role in learning how to listen to the individual to provide the supports they desire.
- Different approaches can be used for person-centered planning to achieve the individual's vision.
- Person-centered planning meetings are best facilitated in a friendly, open environment.

External Links to the Internet:
- Additional information on the subject can be found by visiting these links:
  - [Think About Your Life](#)
  - [The Learning Community For Person Centered Practices](#)

Attachments:
- To access additional resources for this course, click on the "Attachments" tab located on the top-right of your computer screen. Then click an item to view the attached content.

References:
- Amado, A., and McBride, M. (2001). "Increasing Person-Centered Thinking: Improving the Quality of Person-Centered Planning: A Manual for Person-Centered Planning Facilitators."
- Department of Health. (2010). "Personalization through Person-Centered Planning."
- Smull, M., Bourne, M., & Sanderson, H. (2009). "Becoming a Person Centered System."