

Person and Family Centered Planning

January 2014



Purpose of Training:

- The purpose of this training is to provide an overview of the approaches of Person & Family Centered Planning
- Community Mental Health is a large agency that serves a number of populations with diverse needs.
- As the populations vary, the way that Person & Family Centered Planning is approached and implemented can look different depending on the program that is implementing the process.



Overview of Person & Family Centered Thinking



- Many states require that agencies providing services for individuals with disabilities use a person & family-centered planning approach to better support each person in achieving her/his life goals and dreams.

Overview of Person & Family Centered Thinking

- In order to meet that requirement, the people who work for service agencies must have person & family-centered thinking skills so that they can help the individuals & families receiving services to have more control over their own lives and be self-directed in attaining their goals.



Overview

- **Person & family-centered thinking builds on the idea that every action and feeling is preceded by a thought.**
- All of the various styles of person & family-centered planning originate from a person & family-centered way of thinking.



Overview

- How you think about a person and their family will determine your actions.
- Person & family-centered thinking involves seeing the person and their family in a whole new way and provides human service workers with a way of acting on what is learned.



Person & Family-centered thinking involves all of the following:

- **Thinking** about and respecting personal values, preferences, talents, and abilities
- **Listening** to, respecting, and acting on an individual's needs, desires, and dreams
- **Understanding** the importance of each person's established routines
- **Identifying** what is important *to each individual*
- **Considering** what is important *for each person apart from what is important to him/her*
- **Sorting** out health and safety concerns while concurrently supporting individual control and choice

Reasons That Person & Family-Centered Thinking Is Important

- Person & family-centered thinking is important for successfully supporting the individuals with whom you work. It is equally important for you, the human services provider, because it makes it more likely that you will:



- Follow through with individual & family service plans.
- Use more creativity, flexibility, and variety throughout the planning and implementation process.
- Support each individual who receives services to develop and implement plans based on what's important to and for him or her.
- Revise and update plans on an ongoing basis.

Using person & family-centered thinking as the prevailing philosophy among everyone involved in providing consumer support:

- Results in continuously improved services for the individuals and families receiving assistance.
- Gives the people receiving assistance a more direct role in defining and moving forward on their chosen path(s).
- Results in an organizational evolution of how to think about challenges and problem-solving so that it becomes part of the culture rather than a conscious effort.
- Redefines staff and managers' roles based on what is important ***to and for the people receiving support.***

Important To and Important For

- The heart of person & family-centered thinking is the ability to listen in a different way and use what you hear in innovative ways.
- It's important to use what is learned in order to assist in creating a positive balance between what is important to and what is important for each person supported.



IMPORTANT

TO

- What is important to a person incorporates both the individual's behavior and her/his words.
- When people say one thing but act otherwise, rely on the behavior.

FOR

- What is important for people incorporates special care needs and the things you need to keep in mind, such as health or safety issues, what the team and family feels is important to assist the person, and how the person can be a valued member of her/his community.

Important To and Important For

- Think about your daily routine for a moment. What preferences, standards, and ideals do you have about your daily activities? What is important to you? What do you believe you need to do on a daily basis to succeed and avoid destructive consequences? What is important to the people in your life?



- If it is true to for us as helping professionals it is true for the individuals we support!

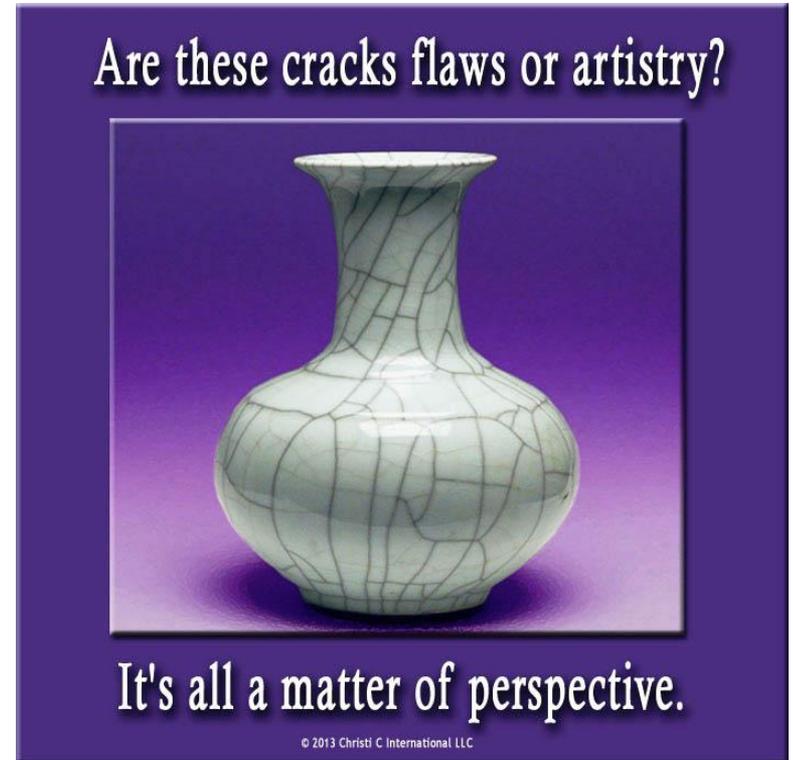
Gifts and Talents

- One of the core beliefs underlying person & family-centered thinking and planning is that all people have important gifts and talents.



Documenting Gifts and Talents

- Historically, the positive attributes and qualities of people with challenges and disabilities have been ignored or disallowed.
 - Countless human services agencies focus on deficits and negative characteristics in order to “fix” the person.
 - The primary consequence of focusing on deficits is that the gifts and capacities each individual brings to the community are completely ignored.



Documenting Gifts and Talents

- Documenting an individual's gifts and talents on an ongoing basis is as important as recording challenges and health/medical needs.
- Some of the qualities that you will want to note are:
 - things the individual is good at doing,
 - things he/she is proud of,
 - positive things you observe others saying or responding to, etc.
- It's also important to keep a list of the types of things the person likes to do along with things he/she doesn't like or doesn't like to do.



Documenting Lessons Learned

- Listening, observing, and recording how a person communicates are also critical components of person & family-centered thinking.
- Documenting the person's comments and/or behavior during both easy and difficult times will help you learn what you can do to effectively support individuals and their families to achieve their goals.
- You will need to review your unit's policies for specific documentation guidelines and requirements.



Supporting Relationships and Connections in the Community

- Providing support to build and sustain relationships and community connections is a vital ingredient of person & family-centered thinking and planning.
- As a human service worker, you will be demonstrating person & family-centered thinking when you provide the supports necessary for people to develop and sustain social relationships with friends, family, religious affiliations, and romantic relationships throughout their entire lifespan.



Supporting Relationships and Connections in the Community

- Psychological studies indicate that people who have positive connections with others who know them and care about them tend to live healthier and happier lives than people without relationships. It is important to realize that what represents inclusion and community participation may be different for each person. For some, inclusion and participation could mean that maintaining their relationships with an already established network of friends and family is what they want. For others, it might involve assisting in the creation of opportunities to develop new relationships.

Questions to Ask Yourself



- Does the person receiving services have a wide variety of relationships (outside of paid staff)?
- Are there members in the local community who would share interests, hobbies, or activities with this person as a friend or club member, etc.?
- What are this person's current social roles? Are these roles considered to be of value?
- What local community members should have the opportunity to appreciate this individual's unique gifts and talents?

Questions to Ask Yourself



- Does the individual have any intimate relationships? Does she or he have (or want to have) opportunities for romantic or sexual intimacy?
- With whom and where does the person currently live? If he/she could live with anyone, who would it be?
- What would this person's own home be like?
- Is this individual working in a job related to his/her interests and abilities?
- What are ways this person can contribute her/his unique talents and gifts that will support her/him in being viewed as a contributing member of the community?

Questions



- By learning the answers to these questions, you will be able to start looking at whether you are helping individuals remain in the service system or helping them have a life equal to the lives of other members of the community.
- You'll also be able to start partnering with the individuals you are supporting to assist them in living their lives as typical members of the community with both organizational (paid) and natural supports.

Section Summary

- In this section, you learned that person & family-centered thinking and planning efforts are focused on creating a balance between what is important **to** an individual and what is important **for** the person's well-being.



- Although person & family-centered thinking strategies do not guarantee that an individual will always get what she/he wants, this way of thinking provides you with a frame of reference for the person and their family.

Section Summary

- The individual is viewed as the major decision maker in her/his own life, and on an ongoing basis you rely on the individual and his/her team to understand the person's personal preferences, including:
 - The person's likes and dislikes
 - The person's gifts, talents and skills
 - The person's hobbies and interests
 - Support strategies that work and don't work for the person
 - The person's daily routines
 - The person's method and modes of communication
 - What's important to and for the person
 - The person's good day versus his/her bad day



Person & Family Centered Planning Basics

- Definition of Person & Family Centered Planning:

“Person & Family Centered Planning provides strategies to increase the likelihood that people with disabilities will develop relationships, be part of community life, increase control over their lives, acquire increasingly positive roles in community life and develop competencies to help accomplish these goals. Person-centered planning helps to clarify and implement these ideals one person & family at a time.” (adapted from *It's Never Too Early, It's Never Too Late*)

Components of a Person & Family-Centered Plan

1. Personal Profile

- A description of the person that includes how the individual is unique; what her/his specific strengths, talents, and skills are; what makes a good day versus a bad day for him/her; the individual's likes and dislikes; etc.



Components of a Person & Family-Centered Plan

2. Personal Futures Statement/Vision Statement/Hopes and Dreams Statement

- A brief paragraph that describes, in the person's (or guardian's) own words,
 - what he/she wants to explore in life,
 - where and how the person wants to live,
 - how the person wants to spend his/her leisure time,
 - how and where the individual desires to work,
 - what the person desires her/his social and family relationships to be,
 - how he/she would like to participate in educational and/or vocational training, and any other aspects of the person's life.



Components of a Person & Family-Centered Plan

3. Specific Activities, Services, Supports, Strategies, and Commitments

- This section of a person & family-centered plan includes a listing of the goals and objectives that include the specific actions to be taken to help the individual realize his/her goals.
- All statements are written using observable and measurable terms and include each team member's commitment as well as realistic timelines for goal attainment.



Components of a Person & Family-Centered Plan

4. Attendance Signatures

- The plan will also include an area for team members' signatures, including family members and community and natural supports, documenting that they were present and participated in the meeting.



Person & Family Planning Values:

- Person & family-centered thinking and planning is an **ongoing process**, not an event that occurs once or twice a year.
- The process continues throughout each day, week, month, and year with significant changes occurring as interests and needs change.



Person & Family Planning Values:

- Certain values are associated with person & family-centered thinking and planning.
 - In this case, values are defined as *a principal, standard, or quality regarded as worthwhile or desirable.*
- The values associated with person & family-centered planning are more than just words; they are the moral, ethical, and professional attributes of the planning process, the embodiment of what person & family-centered planning stands for.

Person & Family Planning Values:

- The focus person (or guardian) defines his/her own outcomes.
- All members of the person & family-centered team are treated with dignity and respect.
- The individual and his/her family are empowered to and assisted in setting their personal goals.
- Team members recognize that it is the right of the persons receiving services to make informed choices and take responsibility for those choices.



Person & Family Planning Values:

- The planning process builds on the strengths, gifts, talents, skills, life experiences, and contributions of the individual.
- There are mutually respectful partnerships among individuals, their families, communities, providers, and professionals.
- Person & family-centered planning encourages and promotes community connections in which individuals are able to develop relationships, learn, work, actively participate in community life, and achieve their full potential.
- Team members listen and act on what the individual and their family communicates.
- The planning team pledges to be honest when balancing what is important to and important for the person and their family.



Person & Family Planning Values:

- The planning team seeks to understand individuals in the context of their age, gender, culture, ethnicity, belief system, social and income status, education, family, and any other factors that make the person unique.
- The planning process acknowledges and values families and assists the efforts of family members.
- Team members advocate for laws, rules, and procedures for providing services, treatment, and supports that meet an individual's needs and honor personal goals.
- The team endorses responsible use of public resources to ensure that qualified individuals are served fairly and according to their needs.

A Team Approach

- As with other methods of service planning, person & family-centered planning requires a team effort.
- As a human service provider, you will participate in the team planning process with the goal of devising a person & family-centered plan that supports the many different ways that people choose to live and work.

The person & family-centered planning team may or may not include the same people who are on the person's interdisciplinary team.



A Team Approach



- One of the best ways to determine who should be included in the person & family-centered planning team is to sit down with the focus person (and guardian) and draw a relationship map. This team may also be called the person's "circle of support" team.
- For many people, the planning team will include a combination of family, friends, and paid professionals. The focus person (and guardian) may want to include the minister, teacher/job coach, court worker, and/or neighbor, for example.

A Team Approach

- The relationship map helps the focus person (and guardian) to determine who their most important relationships are with and who they could depend on to help them with their plan.
- The inner circle includes the people that know the person well and the ones that the consumer trusts the most.
- The next circle contains the people that the focus person interacts with regularly and is most comfortable with.
- The last circle includes the people who are also part of the individual's life, but are not as close as others.



Characteristics of Effective Teams

- Research indicates that the most effective Person & Family Centered planning teams share several key characteristics that contribute to their success.

These team characteristics include:

- Using and focusing on strengths and problem-solving techniques
- Understanding and tolerating conflict while emphasizing resolution
- Mutually agreeing upon and setting team goals
- Making a commitment to accomplish goals
- Clearly defining team roles and responsibilities
- Including all team members
- Sharing and developing leadership skills among all team members



Characteristics of Effective Teams

- Encouraging creativity
- Focusing on strengths
- Feeling free to express feelings and ideas
- Using active listening skills
- Soliciting feedback on the process on an ongoing basis
- Keeping informed
- Making decisions based on what is important to and for the focus person
- Being proud to be part of the team
- Cooperating and supporting each
- Enjoying spending time together
- Trusting each other



Communicating and Including Families & Natural Supports

- Families know the individual the best and are crucial members of the planning team.
- Families can share information about:
 - the person's background,
 - medical history,
 - developmental history,
 - his/her preferences and interests,
 - the individual's likes and dislikes,
 - strategies that work well and those that don't work,
 - how the person communicates,
 - the talents and skills of an individual,
 - what the person's current challenges are.



Useful Tips to aide in Communicating with Families & Natural Supports

- *Maintain Regular Contact*
 - Work to make contact with families as soon as possible.
- *Communicate First and Often*
 - After making contact, you can build a solid relationship with family members by having ongoing, regular communication with them.
 - Many times that first point of contact between support staff and a family member occurs in order to address a question, concern, or a problem. For this reason, it may be a frustrating way for a family member to begin a relationship with the relative's caregiver.

Useful Tips to aide in Communicating with Families & Natural Supports

- *Stay Positive*
 - Human services staff need to work to keep the relationship with families a positive one. A solid, positive relationship is the very best way to partner together in order to serve the best interests of the individual.
- *Using a Variety of Methods to Communicate*
 - Talking and writing notes to family members are just two of the methods you have when you communicate with families. Being creative and practical will go a long way toward making communication effective and positive!



Ways to include Families & Natural Supports

- *Honesty*
 - Being honest when you interact with families is essential. Although doing so can be very difficult - especially when dealing with information that may be difficult for the family to accept - so learning how to best approach family members is a key skill.
- *Advocacy*
 - In your role as a human services provider, you are not only responsible for the care of individuals with mental illness, behavioral challenges and/or developmental disabilities. You are also their advocate.
 - Advocating for a person who receives services is very important because you ensure that needs are being met while honoring personal goals.



Ways to include Families & Natural Supports

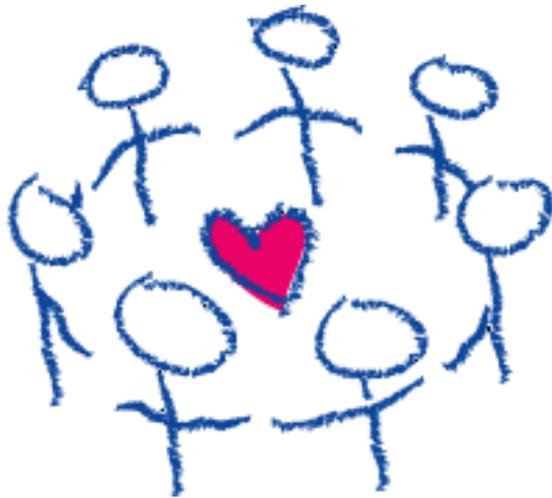
- *Sharing What You Learn*
 - When family members share important information with you, ask their permission to share it with other team members or help them to share it. Don't forget that you all need to work together to support the individual!



- *Showing that You Care*
 - Showing that you are genuinely concerned for the individual - as well as for her/his family members - will serve everyone involved well. Sharing observations with family members as well as asking for their input is a key aspect of maintaining positive and open communication.

Focusing on the Individual

- Person & Family centered planning results in a plan that addresses the unique preferences, choices, and needs of the individual. In developing a person & family-centered plan, you empower each individual to communicate what they want in life and to make decisions about the supports desired and needed to achieve their priorities and goals.



- When people are supported “one person at a time,” each individual is able to create their own life. The person & family-centered team or circle of support team assures that all needed supports are available.
- The power and decision-making rests with the person (or guardian) with the support of their team.

Questions to consider at PCP



1. **About the person:** What are some great things about you? What do you like about yourself? What are you most proud of? What are some of the positive things that people say about you? What makes you unique?
2. **Favorite things:** What do you like to do? At home? At school? At work? For fun? In the community? On vacation? What kind of music do you like? What kind of movies do you like to watch? What are your favorite foods to eat? Do you have any hobbies? Do you collect things?
3. **Least favorite things:** What are the things that you don't like to do?

Questions to consider at PCP

1. Think about the people whom you support. Do you know the answers to the previous questions for each one?
2. Besides asking the person these questions, how else can you obtain this information?
3. What steps do you need to take to know the people that you support better?



Including Hopes and Dreams

- There are many ways to denote the focus person's hopes and dreams. You might write a few paragraphs that communicate what the focus person desires to do and how they choose to move forward in life. Another way would be to list bulleted statements that connect with the person's preferences related to where they want to live, what they want to do during the day, who they want to spend time with, what they want to do for fun. Or list the person's hopes and dreams on a personal futures map.



- As a member of the person & family-centered planning team, you will need to stay open, as the focus person's information and choices will evolve over time.

Facilitating a Hopes and Dreams Statement

- The following questions will help you facilitate the focus person's hopes and dreams statement:
 - What are your hopes and dreams for the future?
 - What are your career goals?
 - Where would you like to live?
 - How would you like to spend your days?
 - With whom do you want to spend time?
 - What do you want your family life to look like?
 - How would you like to spend your recreation and leisure time?
 - What do you want to do for fun?
 - What type of work do you see yourself doing?
 - How do you see yourself involved in the community with others?
 - What are your educational goals?



Looking at Challenges and Barriers

- Discovering what gets in the way of an individual leading the life they desire is another important part of person & family-centered planning. Challenges and/or barriers might be around stress or emotional fears, physical needs, lack of experience or know how, parental concerns, etc.
- Many of a person's specific care needs will be documented in the personal profile under the "*important for*" section. Specific care needs include, but are not limited to, medication management and health-related conditions, nutrition, diet and mealtime support, restroom assistance, mobility, lifting, general supervision and support requirements, sensory challenges, safety issues, financial management support needs, self-advocacy, skill development, etc.



Looking at Challenges and Barriers

- The focus person might have several special care needs that could be seen as barriers. An essential element of the planning should include strategies that will be used to address care needs in an effort to figure out how to not let the person's needs get in the way of their progress.
- Can you think of someone that you are currently working with that has specific care needs that are viewed as barriers to their moving forward? What about the person's care needs could you, the agency, or their natural supports better plan and/or support? What are the conflicts? How do you solve them?



Person & Family – Action Plan

The comprehensive plan will contain an action plan that contains specific goals and objectives.

GOALS

- Describe things that the individual (or guardian) wants in their future. Quote their words and use their language.



OBJECTIVES

- List steps for achieving the goals including the roles of the individual, family members and natural supports. Set time frames.



Person & Family – Action Plan

- The plan will contain steps necessary to achieve the goal, and it will describe who will do what and in what timeframe.



- The format for documenting person & family-centered plans differs from state to state and from agency to agency; most require that goals and objectives be written using observable and measurable terminology.

Person & Family – Action Plan

- For each goal, the planning team identifies:
 - the individual's strengths, skills, and abilities that will assist in meeting his/her goals;
 - the person's social and community connections that could be used to assist in goal attainment;
 - environmental positives (such as living near a bus route).



Person & Family – Action Plan

- The planning team also identifies challenges or barriers the individual might have to face in achieving their goals, such as;
 - health issues requiring treatment;
 - mental health and behavioral issues requiring intervention or support;
 - risk or safety factors;
 - environmental barriers;
 - other challenges that are specific to the individual.

Person & Family – Action Plan



- The next step occurs as the team develops strategies for achieving the goals and overcoming barriers.

- Such strategies might include:
 - Identifying needed treatments or medications;
 - Obtaining necessary support assistance;
 - Identifying skills which might benefit the individual and their family/natural supports to learn;
 - Providing opportunities to increase independence in achieving the goals.

PERSON & FAMILY PLANNING

SUMMARY

PERSON & FAMILY CENTERED PLANNING

1. Facilitates individuals and their families to express their needs, wants, wishes, **desires, and goals**
2. Focuses on individual **strengths and gifts**
3. **Honors choice and preference** including the option of Independent Facilitation
4. Maximizes **independence** and **community connections**
5. Recognizes **cultural background**
6. Uses **natural supports** and services to promote community inclusion
7. Addresses **health and safety** issues
8. Is **applicable to all** individuals regardless of functioning level
9. Requires **staff to be sensitive** to the preferences of the individual and their families
10. Is an **Ongoing Process** that all staff must be involved in; not just a yearly plan



For completing CEI's
Person & Family Centered Planning
training requirement.

You must complete the final exam to
receive credit .