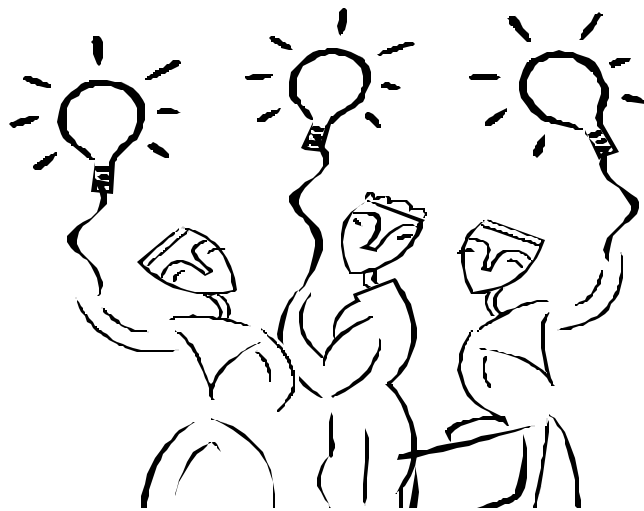


# TRAINING PERSON-CENTERED PLANNING FACILITATORS



## A Compendium of Ideas

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## ***ABOUT THIS MANUAL***

*This manual is a collection of ideas and strategies used in a Minnesota project called the Performance-Based Contracting Demonstration Project. As part of this pilot project to determine the usefulness of an outcome-based approach to determining the quality of services, an extensive two-year training project on person-centered planning was implemented. Individuals were trained to be facilitators of various methods of person-centered planning, and some individuals were trained to train others. This manual was developed for these facilitator instructors.*

*The material contained herein relies on the input and experiences of many people from across the country.*

*This manual is for people who have had a great deal of experience facilitating person-centered plans and wish to train others. The training formats in Section 2 can be used to deliver training, or ideas throughout the manual can be used to design your own training.*

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# FACILITATORS' INSTRUCTOR MANUAL

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2. Center for Community Inclusion, University of Maine, for the material on p. 39, "How Person-Centered is Your Person-Centered Plan?" reprinted from Person Centered Planning: A Guide for Facilitators, 1995.
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7. John O'Brien and Connie O'Brien, for the charts on pp. 70 and 110 reprinted from Framework for Accomplishment, 1989.
8. President's Committee on Mental Retardation, for the article "Implementing Person-Centered Approaches: Now the Hard Part" by Val Bradley, on p. 128.
9. Michael Smull, for the Essential Lifestyle Planning chart on p. 117.
10. Wisconsin Council on Developmental Disabilities, for the article "Person-Centered Planning: Should we do it with everyone?" reprinted from The Spotlight newsletter, vol. 2, no. 4, Winter 1996-7.

# **1. PREPARING TO DELIVER A TRAINING**

# PREPARATION FOR DELIVERING A FACILITATOR TRAINING

## 1. SELECTION OF TRAINEES

Before scheduling a training, consider the purposes and intentions of the training.

- Sort out whether potential participants really have an intention to use these methods in their planning after the training. If they will use the methods, are they serious about implementing the process for real change in people's lives?
- Sort out whether the people requesting to attend need an introductory session about person-centered planning before they make a decision about being trained as facilitators.
- Sort out what type of facilitator training people will need – individual mentoring, a two-day training with a follow-up session, a long-term training project, etc.
- Sort out what type of person-centered planning people want to be trained in and whether you are qualified to deliver that type of training or should link them to another resource.

Issues to consider:

- Why do you wish to conduct a training? For what group?
- Is each person really committed to the on-going facilitation of plans, or do they just want to get a basic idea?
- Should you conduct an application process to determine people's experience, familiarity with, and commitment to concepts?
- Will each person have the support of their agency for the time needed to be a facilitator?
- Does each trainee understand the length of time that will be needed to develop themselves as a facilitator?
- How much experience has each applicant had with the basic ideas and values of person-centered planning?
- What will be the maximum number of people you would consider for participation in a training?

## 2. DECIDE ON TRAINING FORMAT

- What type of training format will you use? Different formats are explained in Section 1 and in Section 2 of this manual.
- If you do an initial two-day training, will you require a follow-up training day a month or two after the initial two days?
- Will you provide individual mentoring to each participant?
- Will you have a longer program like training once a month for a year or more?
- Will you set up networking meetings for people who are doing this type of planning to get together and share with each other?
- How will you design it?



### **3. LOGISTICS AHEAD OF TIME FOR A 2-DAY INITIAL TRAINING**

- Have you ordered the publications you will be using and do you have copies?
- Have all the handouts been copied?
- Is the place set?
- Does the location have the necessary space requirements for the training format you have selected?
- Is there enough wall space?
- Who will provide paper, markers, and tape?
- If participants will be required to bring markers, have they been informed?

#### ***If you will be doing Training Format #2 with small planning groups:***

- Is there an adequate number of small meeting rooms if you will be doing planning circles as in Training Format #2?
- Have the focal people been selected?
- Have the support circle members been invited?
- Has the process been explained to the focal people and the support circle members?
- Have the time requirements been explained to the focal people and support circle members (1-3 p.m. both training days)?
- Has the person's guardian been informed and approved the person's participation?

### **4. DAY OF TRAINING**

- Do you have an overhead projector, slide projector, or other equipment you might need?
- Have arrangements been made for coffee, refreshments, and lunch?
- Review all the supplies on the supply list on pages 9 and 10.

# **TYPES OF FACILITATOR TRAININGS**

## **1. TRAINING FACILITATORS BY CO-FACILITATING AND MENTORING**

This method would be useful if there were only one or two individuals you wished to train to facilitate, or if you wanted to conduct a very individualized training program. Some of the different steps in this type of training might include:

- Review all the concepts of person-centered planning together
- Trainee read and study some facilitator manuals and supplementary materials (see list of resources at the end)
- Observing you facilitating several meetings
- Practicing graphics
- Co-facilitating with you, in different steps, such as:
  - Doing the graphics
  - Leading part of the discussion
  - Being observed facilitating until they were ready to do it on their own

## **2. LEADING A TWO-DAY TRAINING WITH FOLLOW-UP**

Three different formats for an initial facilitator training with follow-up days are included here. Of course, other formats can also be designed.

# **A ONE-DAY INTRODUCTORY OVERVIEW TO PERSON-CENTERED PLANNING**

Before people can make the decision to participate in facilitator training, they often need an introductory overview if they do not already have an understanding of the process and the commitment involved in learning to be a facilitator.

Here is a general outline of some of the concepts and parts of an introductory day:

## **1. General Concepts and Values of Person-Centered Planning: Why Person-Centered Planning is Important**

(samples of overheads/handouts are in Section 7, pp. 70-92)

## **2. How Person-Centered Planning is Different from More Traditional Planning**

(Section 7, pp. 72-81, 120-122)

## **3. Stories of people – your own examples and examples of what you have learned through this process.**

(possible videos to use: “It’s Never Too Early, It’s Never Too Late,” “Shifting Patterns” – both available from the Minnesota Governor’s Planning Council on Developmental Disabilities; “It’s My Life” from the Ramsey County Performance-Based Contracting project work-group)

## **4. Different styles of Person-Centered Planning (p. 82) - only go into detail on styles you are familiar with.**

Personal Futures Planning (pp. 88-103)

Whole Life Planning (pp. 114-115)

Essential Lifestyle Planning (pp. 116-117)

PATH (pp. 118-119)

MAPS (p. 113)

## **5. Exercises**

Participants engage in exercises to “get the feel” of Personal Futures Planning. In groups of 2 or 3, do two or three of the charts from the Personal Profile, such as Relationships and History.

## **6. Why participate in facilitator training?**

You can use the handout “Examples of Skills to Develop/Expand” (pp. 7-8) for each person to examine why they would want to participate in facilitator training. If they already have some experience with person-centered planning methods, this list can be used to identify areas in which to expand their skills.

## 7. Components of the facilitator training program

Explain all the components involved. If you are training by mentoring and co-facilitating, explain the elements and time commitment. If you are doing a two-day initial training with follow-up training, explain the elements and time commitment.

## 8. Making a personal commitment

Have participants commit to whether they wish to participate in facilitator training, schedule the days as necessary, answer all questions, and get all logistics clarified.

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Facilitator instructors can use the following list of “Examples of skills to develop and/or expand in facilitator training” to:

- ◆ Clarify people’s purposes who apply for the training
  - ◆ Aid in the selection of trainees
  - ◆ Assist participant trainees in developing their own training plan
- 
-

# EXAMPLES OF SKILLS TO DEVELOP AND/OR EXPAND IN FACILITATOR TRAINING

- Learn the basics of Personal Futures Planning
- Add more tools to my tool-box of person-centered planning approaches and information
- Adding community members to circles

## **Listening:**

- Improve my listening to people
- Improve groups' listening to person
- Listening beyond the first layer of responses, listening "beneath the surface" – listening to "the unsaid" – listening with "the third ear"
- Listening to /planning with people who don't use words to communicate
- Being sensitive to/dealing with "people pleasing"
- Not using human services jargon – talking in ways understandable to person and their family

## **Visioning:**

- Help a planning group think beyond service system/agency answers
- Assist a person develop a dream/future beyond the current predictable one
- Developing both large and small goals/dreams
- Developing a future rich with community detail that inspires people to action

## **Group Process:**

- Dealing with challenging group members
- Dealing with conflict between family/person/case manager, etc.
- Building safety/trust to say anything

## **Implementation:**

- Dealing with barriers to the realization of people's dreams
- Sustaining a group over time

## **Celebrating**

# PERSON-CENTERED PLANNING TRAINING SUPPLY LIST

\_\_\_\_\_ Address/directions/telephone numbers of where you're going

\_\_\_\_\_ Handouts and publications:

- Content of training
- PCP Personal Development and Technical Assistance Planning forms if you are using them

\_\_\_\_\_ Markers for charts/maps

\_\_\_\_\_ Markers for name tags

\_\_\_\_\_ Masking tape

\_\_\_\_\_ Name tags

\_\_\_\_\_ Poster paper

\_\_\_\_\_ Presentations materials – overheads, etc.

\_\_\_\_\_ Slide projector or VCR and videotape if you will be using those

\_\_\_\_\_ Books and materials you wish to share about or show as samples

\_\_\_\_\_ Evaluations if you are using them

\_\_\_\_\_ Certificates of attendance if you are using them

\_\_\_\_\_ Container for evaluation forms

\_\_\_\_\_ Extension cord

\_\_\_\_\_ Refreshments

## Morning:

- Coffee, tea
- Cream, sugar
- Stirrers
- Coffee pot/s
- Cups
- Plates
- Napkins
- What you will be serving: juice, rolls, bagels, fruit, etc.

Lunch:

- (if you will be serving at the training site)

Afternoon:

- (what you will be serving: cookies, soda, fruit, etc.)

\_\_\_\_\_ Signs at training site for directions to meeting room



## **2. FACILITATOR TRAINING FORMATS**

# **FORMATS FOR DELIVERING FACILITATOR TRAINING**

## **THREE TWO-DAY FORMATS AND FOLLOW-UP TRAINING DAYS**

What follows are three different formats for an initial two-day facilitator training and subsequent follow-up training days. Elements from the three different formats can be combined. Each instructor should plan their training based on their own comfort level and the particular needs of a group.

These formats are based on Personal Futures Planning. If you wish to provide training about Essential Lifestyles Planning or PATH (Planning Alternative Tomorrows with Hope), we recommend participating in the specific instructor trainings designed for those two person-centered planning methods.

If a group has little or no experience with Person-Centered Planning methods, we recommend providing an introductory session about this type of planning first (see previous section). Participants can then decide if they wish to be trained to become facilitators. We do not recommend people participate in facilitator training if they have no familiarity with the concepts of person-centered planning and do not really know “what they are getting into.”

We also recommend that a trainer NEVER does only an initial training, but builds in some training about follow-up. Other training days can be scheduled a month or two months out from the initial training. Ideally, the trainer will also work with a facilitator trainee over time (say for a year or two), to ensure development of a person’s skills and that the planning groups maintain the work toward implementation.

## **PRIOR TO ANY OF THESE TRAININGS:**

1. Decide on which materials and manuals you will provide. We recommend providing each facilitator trainee all of the following:

- A copy of “Person-Centered Planning: Finding Directions for Change Using Personal Futures Planning” – available from:

Dr. Beth Mount  
Graphic Futures, Inc.  
25 W. 81<sup>st</sup> St., 16-B  
New York, NY 10024  
(212) 362- 9492

- A copy of “Increasing Person-Centered Thinking: Improving the Quality of Person-Centered Planning” – available from:

Institute on Community Integration  
University of Minnesota  
150 Pillsbury Dr. S.E.  
Minneapolis, MN 55455

- Copies of whichever handouts from Section 7 of this manual you wish to use during the training

2. Decide the maximum number of participants you wish to have. That number will depend on your comfort level and the degree of input you wish to provide to each participant during training sessions. For these three different formats, most people will be comfortable with a maximum of 10 to 25 people. Also decide if there is a minimum number you require to conduct a group training.

3. Decide if you wish to use a video as part of the training, such as:

- “It’s Never Too Early, It’s Never Too Late” or “Shifting Patterns” – both available from the Minnesota Governor’s Planning Council on Developmental Disabilities, telephone (651) 296-4018.
- “It’s My Life” – available from Tim Hammond, Ramsey County Community Human Services, telephone (651) 266-4337, or Lynn McDonald, Arc-Ramsey, telephone (651) 778-1414.

# **TYPE 1 FORMAT: DEVELOPING YOUR OWN PLAN**

With this format, participants develop their own plans with each other. No focus individuals or groups are used.

## **EXPECTATIONS OF TRAINING SESSION**

Each participant will:

- understand the basic concepts of Person-Centered Planning
- have experience using the different charts of Personal Futures Planning
- see the concepts directly applied in their own life
- work with others to use the concepts and methods to develop Personal Futures Plans for other workshop participants
- have the opportunity to experience personally what it is like to have person-centered planning done with your own life

## **PREPARATION**

A meeting room is needed that has a large enough space for groups of 3 to meet in small groups and to make charts on the walls.

This type of training format differs from the other two in that the facilitator trainees learn the methods by doing their own plans. No focal people or circle members attend the initial training.

## **A NOTE ON SCHEDULE**

If there is a very small group of participants, it might be possible to complete this training in one very long day or a day and a half.

# TYPE ONE FORMAT

## DAY ONE – PERSONAL PROFILES

### MORNING SESSION (9:00-12:00)

9:00 – 9:45 Describe the training. Go over expectations and any ground rules you wish to establish.

Present:

- *Principles of Person Centered Planning,*
- *Basic Information on Personal Futures Planning,* and
- *Qualities of a Facilitator*

Select the overheads and handouts you wish to use from section 7, pp. 70-92.

9:45 – 10:15 Select *Graphic Exercises* to do from Section 6, pp. 61-67 of this manual.

10:15 - 10:30 Break

Over the break, decide how you will break participants into groups of three. Should they select people from other agencies to work with, or should people who work together do the exercises together? Should they self-select, or will you make the decisions? You can look for a balance of familiarity, skills, experience, etc.

10:30 – 11:45 Work in groups of three

Present the *Personal Profile charts* (Section 7, pp. 93-96):

- Relationships
- History
- Places
- Interests and gifts – what doesn't work
- Nightmares and dreams (it's often more positive to end with dreams than with nightmares)

Present *Optional Maps*

- Choices
- Health
- Respect
- Home or work
- Communication
- Daily work

One trainee is the focus person. One person draws the charts, another facilitates the discussion. For this person, each group completes the five main maps listed above. If people would like to or if there is time, they can use all or some of the optional maps.

11:45 – 12:00 Have small groups discuss the main themes and patterns in each of the maps for their focus persons (see Section 4 in the Facilitator Manual “*Increasing Person-Centered Thinking*,” pp. 30-31)

What will be important ideas to develop in a Vision?

Large group – summarize what some of the themes and patterns are

12:00 – 1:00 Lunch

#### **AFTERNOON SESSION (1:00 – 4:30)**

1:00 – 2:00 Same groups of three. Second person is the focus person, other two people alternate roles.

2:00 – 2:30 Discuss the themes and patterns in the charts

2:30 – 2:45 Break

2:45 – 3:45 Groups of three, third person is the focus person

3:45 – 4:15 Discuss themes and patterns in the charts

4:15 – 4:30 Any discussion or questions from the whole day

Set up for tomorrow: think overnight about their visions and potential action plans

# **TYPE ONE FORMAT**

## **DAY TWO – A POSITIVE FUTURE**

### **MORNING SESSION (9:00 – 12:00)**

9:00 – 9:45      Review goals and expectations, content for the day

Debrief from Day One:

- What was it like to be the focus person?
- Who would you want to invite to your planning meeting? (people can make lists of who they would want there – what do they see in making the lists?)
- What was it like in the role of the discussion facilitator?
- What was it like in the role of the graphic recorder?

9:45 – 10:15      Present: Visioning charts on *A Desirable Future* (section 7, p. 98-103) “Steps of the Futures Planning Meeting”

- Review the Personal Profile
- Describe trends in the environment
- A positive future for...
- Brainstorm strategies
- Priorities and commitments
- Set the next meeting time
- Obstacles and opportunities
- Issues for Organizational/Systems Change

10:15 – 10:30      Break

10:30 – 11:30      Same groups of three. Do visioning, strategy, commitment charts for the first focus person

11:30 – 12:00      Large group discussion: What are they seeing, what questions are coming up? What do they see about dreaming? What do they see about the quality of their action plans? Who would it be important to have in the planning circle?

### **LUNCH**

### **AFTERNOON SESSION (1:00 – 4:00)**

1:00 – 1:45      Groups of three, visioning charts for the second focus person

Take an informal break as groups finish

- 2:00 – 2:45 Groups of three, visioning charts for the third focus person  
 2:45 – 3:00 Debrief entire process
- 3:00 – 3:15 Present *Follow-Along Meetings* (Section 7, pp. 104-107) and *Other Information on Person Centered Planning* (Section 7, pp. 108-128)
- With an individual who receives services and their support circle, follow-along meetings are critical. Present the information on how to facilitate them.
- As time allows, you can also present other information on Person-Centered Planning that you feel is important for this group.
- 3:15 – 3:30 Trainees' plans to learn to facilitate
- Discuss with the trainee participants their plans to conduct futures plans with individuals who receive services. Who will actually try this out, who will work together?
- Set up for people to do plans with focal people they support if they choose to pursue becoming a facilitator – what mentoring will you provide, how will they work with partners?
- 3:30 – 4:00 Subsequent facilitator training
- What will be the next training needed?
  - Should everyone do a plan and come back in, say, two months to share the plans they have completed and get additional training? (this may already be built into your training program)
  - When will Follow-Up training days be held?
  - Participants can fill out a “PCP Personal Developmental and Technical Assistance Planning” (pp. 33) sheet as a training plan. The “Examples of Skills to Develop/Expand” (pp. 7-8) can be used to assist in identifying areas in which to grow and develop.
  - Have each person leave as clear as possible about what their next steps are – completing a plan, doing nothing, coming back for training, etc.
- You can do Certificates of Attendance and Evaluation forms if you wish (samples are on pp. 129-134).



# **TYPE TWO FORMAT: PRACTICE WITH DIFFERENT GROUPS**

This format uses:

- Small practice groups of individuals with disabilities and their teams/circles
- Facilitators working together or in trios to facilitate a real plan

## **PREPARATION**

The local coordinator needs to set up focus individuals and their planning groups to come from 1 to 3 p.m. each of the two days. The number of focus individuals needed will depend on the number of workshop participants. For each focus individual, there should be two or three facilitator trainees who will work together as a team. In deciding which trainees should work together, it's useful to consider several factors:

- Balance of different strengths and weaknesses
- Mix of people from different organizations
- Mix of roles: residential, employment, case manager, direct support, supervisors, family, friends, acquaintances from the community, etc.

Ideally, people would be facilitating for a focus individual for whom they do not have direct accountability.

It is critical that the individual with disabilities and their circle of support are prepared for participation in this training. The focus individual and/or their guardian should have consented to their participation. All circle members should understand that this is a training taking place under supervision and would not normally be done like this. Facilitator trainees need to understand that how much they practice this type of planning impacts another person's life.

## **LOCATION**

A site will be needed that has a room large enough for the whole group and enough small rooms to accommodate the individual planning groups. For instance, if there are five focus individuals, one large room and five small rooms or separate areas of a larger room will be needed. Churches often have a number of smaller rooms that fit the bill, as do some university student centers and community centers.

## **EXPECTATIONS OF TRAINING SESSION**

Each participant will:

- Understand the basic concepts of Person-Centered Planning
- Have experience using the different charts of Personal Futures Planning
- See the concepts directly applied in the life of a real person and their planning circle
- Work with others to use the concepts and method to develop a Personal Futures Plan for an individual who receives services

# TYPE TWO FORMAT

## DAY ONE – PERSONAL PROFILES

### MORNING SESSION (9:00-12:00)

Select the material you wish to present from the handouts enclosed in Section 7.

#### A. Present

1. Goals, Expectations and Format of the Training Session – describe the training and what will happen
2. *Principles of Person-Centered Planning* (pp. 70-82)
3. *Qualities of a Facilitator* (pp. 83-87)
4. *Basic Information on Personal Futures Planning* (pp. 88-92)
5. *Futures Planning: the Personal Profile charts* (pp. 93-96)
  - Relationships
  - History
  - Places
  - Interests and gifts – what doesn't work
  - Nightmares and dreams (it's often more positive to end with dreams than with nightmares)
6. Present *Optional Maps*
  - Choices
  - Health
  - Respect
  - Home or work
  - Communication
  - Daily work

#### B. Break – take a break as needed

Over the break, make sure that the matches between focus person and facilitator partners are decided upon. When deciding which facilitators should work together in partners or trios, look for a balance of skills, experience, personal style, and knowledge of the focus person. In groups of two or three (depending on how many people you have), have people practice at least one or two charts with each other – Relationships and Background/History are good ones.

Whether people work in partners or trios will depend on the number of focus individuals – two's are better than three's if you have enough focal people.

#### C. First Practice Session

D. Instructions to groups before lunch and set-up for afternoon planning session (at least half an hour before lunch):

- Be back before 1:00 to meet your group
- Have your room set up with paper, circle of chairs
- Nametags and refreshments available
- Decide how facilitator partners will trade off roles – graphics and discussion facilitation for which sections of the meeting
- Will the group want to invite other people to join them for the next day's afternoon session?
- Let people know you will be available in the afternoon if they have problems in their small group.

## **LUNCH**

### **PRACTICE SESSION – PERSONAL PROFILE (1:00 – 3:00 P.M.)**

Trainees work in pairs or trios to facilitate and complete the charts of the Personal Profile. As groups are set up, go around to make sure everyone has what they need and if they have any questions. Sit in on different groups to make suggestions about sequence, approach, problems, etc.

### **AFTERNOON DEBRIEFING (3:00 – 4:00 P.M.)**

Have the whole group of trainees meet together to see what they have to share. What did they see? What did they learn? What problems did they encounter?

The group could go around to the different smaller rooms and have people share their best chart. You can make comments about particular graphics that were done well or other issues of note.

Set people up for Day Two and have them think overnight about a vision for the person and what they want to accomplish with their group on Day Two.

# TYPE TWO FORMAT

## DAY TWO – A POSITIVE FUTURE

### MORNING (9:00 – 12:00)

A. Present the Visioning meeting charts: “*Steps of the Futures Planning Meeting*” (section 7 handouts, pp. 98-103)

- Review the Personal Profile
- Describe Trends in the Environment
- A Positive Future For...
- Brainstorm strategies
- Priorities and Commitments
- Set the next meeting time
- Obstacles and Opportunities
- Issues for Organization/Systems Change

Select any other handouts you wish to use from Section 7 as overheads and/or handouts.

B. Have trainees do their own Vision chart for their own life, using posters and markers.

Set up the visioning – develop a dream for their own life, no limits on time or money.

You can use music in the background if you wish (see list of Musical Resources in Section 6, p. 64 or use your own favorites)

Large group sharing – what did they see about dreaming

C. How to do Follow-Along/Implementation Sessions

With an individual who receives services and their support circle, follow-along meetings are critical. The most important part of the plan is the follow-up for actual implementation.

Select Follow-Along Overheads and handouts you will use from Section 7, pp. 104-107.

D. Present: Other Information on Person-Centered Planning

Select other information from Section 7 you wish to provide (pp. 108-128), such as:

- *“Positive Change is More Likely Under These Conditions”*
- *A Comparison of Three Types of Planning*
- *Contexts Affecting Choice*
- *Responses to “I Want...”*

## E. Individual Processes: Developing Themselves as Facilitators

Discuss with the trainee participants their plans to conduct futures plans with individuals who receive services. Who will actually try this out, who will work together?

Set up for people to do plans with focal people they support if they choose to pursue becoming a facilitator – what mentoring you will provide, how they will work with partners. (Your training program may already have these elements).

Use “Examples of Skills to Develop/Expand” (pp. 7-8) and “PCP Personal Development and Technical Assistance Planning” sheets (pp. 33). Each trainee can make a training plan for themselves. What skills do they want to develop?

## F. Set Up for Afternoon Sessions

Remind people it is important to set follow-up meeting times and invite others to join the planning circle. Repeat instructions from Day One:

- Be back before 1:00 to meet your group
- Have your room set up with paper, circles of chairs
- Nametags and refreshments available
- Decide how facilitator partners will trade off roles – graphics and discussion facilitation for different sections of the meeting
- Will group want to invite other people to join them for subsequent meetings?
- Let people know you will be available in the afternoon if they have problems in their small group

## **LUNCH**

## **PRACTICE SESSION (1:00 – 3:00 P.M.)**

Small groups meet to complete the Day Two visioning meeting charts

Visit the different groups and provide suggestions as needed. The input you provide will be based on both your personal style and the needs of different groups.

You can ask facilitators ahead of time: What feedback do you want me to give you? Work out with each group ahead of time whether they would like suggestions during the process, or at the end.

## **AFTERNOON DEBRIEFING (3:00 – 4:00 P.M.)**

Debrief entire process.

You can use the “Process Review Checklist” and “Content Review Checklist” in Section 3 (pp. 38-48 of this manual) to have each group evaluate themselves, and for your review.

Group discussion:

- How did it go? What did they see?
- What’s set up for follow-up in each group?

End the day with discussion and plans:

- When will this group get back together again?
- Should everyone do a plan and come back in say two months to share the plans they have completed and get additional training? (this may already be part of your training program)
- When will Follow-up Training days be held?
- How will they continue to train themselves?
- What will be the next areas of training needed?
- Have each person leave as clear as possible about what their next steps are - completing a plan, nothing, coming back for training, etc.

You can do Certificates of Attendance and Evaluation forms if you wish (samples on pp. 129-134).

# **TYPE THREE FORMAT: DEMONSTRATION WITH ONE FOCAL PERSON**

In this format, the trainer(s) facilitate a futures plan with a focal person who receives services and their support circle. The trainees observe and discuss each part.

## **PREPARATION**

For this format, a focal person with disabilities and their support circle will need to be scheduled for both days. The focal person will need to be someone who will be comfortable talking in front of whatever size group is set up for the training (it is recommended to not be more than 20-25 people).

When facilitating the plan, have the focus person and their support circle sit close to the charts. Participant trainees should sit behind them, and take notes about the things they notice, what to ask about, or want to discuss.

If television support is available at the facility in which the training is conducted, it is also possible to have the plan be completed in one room while the trainees sit in another room watching by closed-circuit TV.

## **EXPECTATIONS OF TRAINING SESSION**

Each participant will:

- Understand the basic concepts of Person-Centered Planning
- Learn the different charts of Personal Futures Planning
- See the concepts directly applied in the life of a real person and their planning circle
- Learn to see and draw out the important themes and patterns in each chart that can lead to the development of a positive future



# TYPE THREE FORMAT

## DAY ONE – PERSONAL PROFILE

### MORNING (9:00 – 12:00)

9:00 – 10:00 Present Goals, Expectations, and Format of Training Session

Select the overheads and handouts you wish to use from Section 7

Present

1. *Principles of Person-Centered Planning* (Section 7, pp. 70-82),
2. *Qualities of a Facilitator* (pp. 82-87),
3. *Basic Information on Personal Futures Planning* (pp. 88-92),
4. *Futures Planning: The Personal Profile Charts* (pp. 93-96):

- Relationships
- History
- Places
- Interests and gifts – what doesn't work
- Nightmares and dreams

10:00 – 11:00 Trainers facilitate: Relationships and Places maps with focus person and support circle

11:00 – 12:00 Whole group: Identifying important patterns and themes. Focus person and circle can stay for this discussion, or take a break (See scheduling note at end of this section).

1. What are the patterns in the Relationship map? What do you notice?
2. To what extent is the person always with people with disabilities, or always in human service groupings?
3. Do they know a lot of community members, but only as acquaintances rather than friends?
4. How much like the patterns of typical community members is the pattern of relationships for this person?
5. Are there any hints of a more desirable future in this map?
6. What are the patterns in the places map?
7. Is it a pattern of visiting places like a tourist, or real sharing and belonging?
8. What ideas are embedded in this map for a more desirable future?

## **AFTERNOON (1:00 – 4:00)**

- 1:00 – 2:00 Trainers facilitate: History, Interests and Gifts/ Doesn't Work Maps
- 2:00 – 2:30 Whole group identify: Important patterns and themes (focus person and their support circle can take a break or stay for discussion)
- What are the important themes in the History map? What important life experiences have been missed? What would be important to this person, based on their history?
- What are the patterns in the Interests and Gifts/ Doesn't Work map – what will be important in the person's future?
- 2:45 – 3:15 Trainers facilitate: Nightmares and Dreams
- Whole group summarize: What will be ideas to pursue on Day 2 in developing a Positive Future? (again, focus person and their support circle can take a break or stay for discussion)
- 3:15 – 4:00 Whole group summarize: What will be ideas to pursue on Day 2 in developing a Positive Future? (again, focus person and their support circle can take a break or stay for discussion)
- Present: Optional Maps (pp. 93-96)
- Choices
  - Health
  - Respect
  - Home or Work
  - Communication
  - Daily Routine

## **ANOTHER SCHEDULE FOR THE DAY**

NOTE: If it is not working for the focal person and their support circle to stay for the whole day, or to have the planning meeting interrupted for trainee discussion times, you could structure the day to do the entire planning meeting in a two-hour block each morning, and then work through discussion of the different maps and issues in the afternoon.

In the afternoon, trainees could also practice some of the maps with each other, as in Type 1 Format.

## **TYPE 3 FORMAT**

### **DAY TWO – A POSITIVE FUTURE**

#### **MORNING (9:00 – 12:00 A.M.)**

9:00 – 9:30      Debrief Day One

Any thoughts overnight? What’s working and not working for the group?

9:30 – 10:00      Present: The Day 2 charts “*Steps of the Futures Planning Meeting*” (pp. 98-103)

- Review the Personal Profile
- Describe Trends in the Environment
- A Positive Future for...
- Brainstorm Strategies
- Priorities and Commitments
- Set the Next Meeting Time
- Obstacles and Opportunities
- Issues for Organizational/ Systems Change

10:15 – 11:00      Trainers facilitate with the focal person and their support circle the following charts:

- Review the Personal Profile
- Describe Trends in the Environment
- A Positive Future for...

11:15 – 12:00      Whole group debrief – important themes, what could have been developed, different options for different parts of vision, how to get group aligned (focal person and their support circle can stay for discussion or take a break)

#### **LUNCH**

## AFTERNOON (1:00 – 4:00 P.M.)

- 1:00 – 1:45 Trainers facilitate with the focal person and their support circle:
- Brainstorm Strategies
  - Priorities and Commitments
  - Set up the next meeting time
  - Optional charts if needed: Obstacles and Opportunities / Issues for Organizational & Systems Change
- Make sure there is some kind of follow-up agreed upon before the support circle breaks up.
- 1:45 – 2:00 Complete and thank focus person and their circle
- Break
- 2:00 – 2:45 Discuss different strategy options that could have been proposed in the 1:00 to 1:45 session and debrief entire two-day process
- 2:45 – 3:15 Present: *Formats for Follow-Along Meetings* (Section 7, pp. 104-107)
- What will be important in follow-along?
  - Who else should be invited to join the group?
- With an individual who receives services and their support circle, follow-along meetings are critical. Present the information on how to facilitate them.
- As time allows, you can select to present any information in “*Other Information on Person-Centered Planning*” (pp. 108-128) important for this group.
- 3:15 – 3:30 Trainees’ plans to learn to facilitate
- Discuss with the trainee participants their plans to conduct futures plans with individuals who receive services. Who will actually try this out, who will work together?
- Set up for trainees to do plans with focal people they support if they choose to pursue becoming a facilitator – what mentoring will you provide, how will they work with partners?
- 3:30 – 4:00 Subsequent facilitator training
- What will be the next training needed?

Should everyone do a plan and come back in, say, two months to share the plans they have completed and get additional training? (This may already be part of your training plan). When will Follow-Along Training Days be scheduled?

Participants can fill out a “PCP Personal Development and Technical Assistance Planning” (p. 33) handout as a training plan. Use “Examples of Skills to Develop/Expand” (pp. 7-8) to assist in identifying areas for growth and development.

Have each person leave as clear as possible about what their next steps are – completing a plan, nothing, coming back for training, etc.

You can do Certificates of Attendance and Evaluation forms if you wish (samples on pp. 129-133).

## **ANOTHER SCHEDULE FOR THE DAY**

NOTE: If it is not working for focal person and their support circle to stay for the whole day, or to have the planning meeting interrupted for trainee discussion times, you could structure the day to do the entire planning meeting in a 2-hour block each morning, and then work through discussion of the different maps and issues in the afternoon.

In the afternoon, trainees can practice the maps with each other, as in Type 1 Format. It would also be useful to have each trainee do their own “Positive Future Map” as in Type 1 Format, Day 2.

# OTHER TRAINING EXERCISES

Other types of exercises or material that you might wish to use either at the initial training days or in follow-up training days:

## 1. ROLE PLAYS

Have place cards or signs made up with some different types of roles in a planning circle, such as:

focal person  
case manager  
parent  
residential program supervisor  
job coach  
graphic recorder  
discussion facilitator

You can also use some of the "Difficult Group Member" roles described in Section 9 of the Facilitator's Manual "Increasing Person-Centered Thinking," such as:

broken record	attacker
doubting thomas	gossiper
headshaker	know it all
dropout (non-participating member)	back seat driver
whisperer	interrupter
loudmouth	teacher's pet
interpreter	

Do a role play of a planning meeting with these different roles assigned to different trainees. If the group is large, you can have some break up into smaller groups.

Instead of place cards, you can prepare different hats with the different labels on them for participants to wear during the exercises, or make up another method such as different vests.

## 2. PANEL OF CONSUMERS AND/OR FAMILY MEMBERS

If you are in a geographic area where you have facilitated different places, or several people have had person-centered planning circles, you can have a panel of focal people, their family members, or others who might be important circle members, come in and talk about how the process had been, how it has differed from more traditional planning, etc.

# PCP PERSONAL DEVELOPMENT AND TECHNICAL ASSISTANCE PLANNING

1. Areas I see I already bring as strengths to Person-Centered Planning and facilitation:

2. Training/development areas - areas to learn, expand, or strengthen:

	TA or Support Needed	Frequency/Schedule
a.		
b.		
c.		
d.		
e.		
f.		

3. Best times of day/week for me for peer support network meetings:

# FOLLOW-UP TRAINING DAYS

A useful way to structure the initial facilitator training is to have the initial two training days and then schedule a follow-up training day perhaps six weeks or two months after. This allows trainees enough time to develop a circle and lead a planning meeting on their own or with a fellow trainee.

On this follow-up training day, trainees can bring the charts that they completed, share, and get further training. The trainers can assess the qualities of the plans that were done and look for areas to complement the areas that need strengthening. The benefits are to observe which areas were strong and weak in getting across to this particular group.

Additional follow-up training days can also be scheduled based on how you have designed the training program. For instance, a half-day or full-day every month or two for a year-long or two-year long program can be scheduled.

Some of the activities and topics that can be addressed on these days include:

1. Participants share which charts they are proud of
2. Participants discuss particular problems they had in the planning or with the group
3. Topics to address:
  - adding community mentors to circle
  - quality of the visions developed (pp. 33, 35 in *Facilitator's Manual*)
  - strength of the follow-up plans (pp. 105-107, this manual)
  - strategizing and brain storming to move the dreams into reality
  - agency and system change issues
  - any material from the section "Other Information on Person-Centered Planning" (pp. 108-128, this manual)



#### 4. Exercises:

##### **A. “POSITIVE CHANGE IS MORE LIKELY UNDER THESE CONDITIONS”**

Take the handouts from the handout section of this manual (pp. 109, 107) and have people identify which of the ten elements they have in their group and which they are missing. Strategize on finding and adding the elements missing.

##### **B. “INTER-VISIONARY TEAM”**

Take the handouts from the Facilitator’s Manual, “Increasing Person-Centered Thinking” (pp. 21-22) and look and see which members they have in their group and where they can find members/roles to add.

##### **C. “PROCESS AND CONTENT REVIEW CHECKLISTS”**

Take the checklists from Section 3 of this manual (pp. 37-48) and have the trainees rate the quality of their own plans and process.

##### **D. “QUESTIONS FOR REFLECTION AND DRAWING THEMES” (FACILITATOR’S MANUAL, PP. 30-31)**

Participants can review their own maps and maps of other participants to reflect on the themes which were revealed in the different charts they completed, and identify other issues for planning groups to pursue.

### **3. EVALUATING THE QUALITY OF A PLAN/ PROCESS AND CONTENT REVIEW CHECKLISTS**

# EVALUATING THE QUALITY OF PERSON-CENTERED PLANNING

## AREAS OF PLANNING TO EVALUATE

This section contains five checklists which a trainer can use to evaluate the quality of the planning which participant trainees complete and to identify areas for additional training:

1. Understanding and application of the **PHILOSOPHY, ASSUMPTIONS, AND BELIEFS** of person-centered planning.

-- See the checklist "How Person-Centered is YOUR Person-Centered Planning"

2. **PROCESS** used in conducting person-centered planning

-- See the two checklists on PROCESS REVIEW

3. **CONTENT** of Person-Centered Planning and skills in creating an action plan

-- See the checklist on REVIEW OF CONTENT AND ACTION PLAN

4. Monitoring the ongoing **FOLLOW-ALONG, IMPLEMENTATION, AND REVISION** of the person-centered plan and person-centered action plan.

The plan may change as part of the life process. Was the plan implemented as written? How were changes incorporated and addressed?

-- See the checklist on FOLLOW-ALONG AND IMPLEMENTATION

The trainer can evaluate the plans and processes, then have the trainees rate their own work, and discuss differences and agreements.

## HOW PERSON-CENTERED IS YOUR PERSON-CENTERED PLANNING?

*Please take a moment to answer the following questions to determine the person-centeredness of your planning.*

- \* Did the individual choose this person-centered process to assist in their planning (was an array of options presented in a clear and understandable fashion)?
- \* Did the individual select who they wanted to assist in their planning?
- \* Did the individual select who they wanted to facilitate their planning?
- \* Did the individual make the invitations?
- \* Does the planning group include non-paid community members?
- \* Did the individual choose when and where to have the planning/meetings?
- \* Did the individual determine in what life areas planning would occur?
- \* Did the dreams and desires of the individual form the foundation for the process?
- \* Did the individual and the people who know him/her the best and love him/her the most contribute the most?
- \* Was/is the process positive and respectful?
- \* Were the strategies used to gain the individual's perspective respectful?
- \* Did the process identify and build upon the individual's gifts and talents?
- \* Was an ideal home for this individual identified?
- \* Were ideas for an ideal job or community contribution for this individual generated?
- \* Were other images of a desirable future identified?
- \* Does the vision/plan identify ways to assist the individual:
  - expand and deepen their network of relationships
  - contribute to community life
  - expand the number and type of valued social roles they experience
  - increase their experience of choice, control, and self-determination
- \* Were the strategies and supports identified that are likely to cause the individual upset and frustration?
- \* Did the group identify others to invite to join the circle, especially community members?
- \* Are all the planning meetings flexible and dynamic?
- \* Is the individual participating in all phases of the process?
- \* Does the individual have a formal role in the quality assurance?

\*\* Adapted from Final Report of the Person Centered Planning Pilot, Center for Community Inclusion, Maine's UAP, University of Maine

# IMPROVING THE QUALITY OF QUESTIONS

CONTRAST THESE QUESTIONS  
WITH...

MORE VISION-ORIENTED,  
COMMUNITY-LIFE QUESTIONS AND  
APPROACHES

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## *Group understanding of the person's past:*

How did that feel – hard?

How does/did that feel...

(of circle): If you had gone through those experiences, how would you feel?

## *Ideal home:*

Do you want to live with (a specific person)?

If you could live with anyone, who would you most like to live with?

Which of the people here would you like to live with?

Where would you most like to live? If you could live anywhere, where would that be?

(Person says they want to live with a specific staff person, family member, etc.).  
That's not going to happen, so who else would you like to live with?

What is it about that person that you really like? (Have group think about what that person provides – where could someone else like that be found?)

## *Ideal work/job:*

Do you want a community job?

If we saw... at work, what kind of job could we see him/her doing?

What kind of community job do you want?

(Take a list of interests/gifts) What are all the places where people do anything with these interests? Where are all the places/people who would like to receive those gifts?

(after group has listed) Which of those would be most exciting to you/interest you the most?

That kind of job wouldn't work out, what about...?

If... were going to have that kind of job, what kind of support would he/she need? What would have to be there to make it successful?

# EVALUATION OF PERSON-CENTERED PLANNING PROCESS REVIEW

Name of focus person: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of reviewer: \_\_\_\_\_

Date of review: \_\_\_\_\_

E=Excellent

G=Good

N=Needs work/Not yet

Facilitator Evaluation		Reviewer Evaluation
_____	1. Did the facilitator/s use current best practices strategies in facilitating the person-centered plan? Give examples.	_____
_____	2. Was pacing used effectively to move the person-centered planning process along at a rate that worked for the focus person and their circle of support? Give examples.	_____
_____	3. Were good listening skills used? Give examples.	_____
_____	4. Was team work used to enhance the effectiveness of the person-centered planning process? Give examples.	_____

\_\_\_\_\_ 5. Were conflict resolution methods used when needed? Give examples. \_\_\_\_\_

\_\_\_\_\_ 6. Was consensus building used to promote the work of the support network? Give examples. \_\_\_\_\_

\_\_\_\_\_ 7. Was the self-determination of the focus person fostered so the person-centered plan is created by and with the focus person and not for them? Give examples. \_\_\_\_\_

\_\_\_\_\_ 8. Were relationships built with members of the circle of support so they will, on an on-going basis, participate in the work of the action plan? Give examples. \_\_\_\_\_

\_\_\_\_\_ 9. Did appropriate celebrations occur? Give examples. \_\_\_\_\_

# PERSON-CENTERED PLANNING PROCESS REVIEW

Name of focus person: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of reviewer: \_\_\_\_\_

Date of review: \_\_\_\_\_

E=Excellent

G=Good

N=Needs work/Not yet

<b>GREAT</b>	<b>GOOD</b>	<b>NEEDS WORK</b>
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1. Degree to which facilitator/s created a welcoming environment for group participation?

_____	_____	_____
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Reviewer's observations and comments on strategies used by facilitator/s.

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2. Degree to which the facilitator/s created and fostered an environment that supports, nurtures and empowers the active participation of the focus person?

_____	_____	_____
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Reviewer's observations and comments on strategies used by facilitator/s.

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**GREAT      GOOD      NEEDS  
WORK**

3. Degree to which the facilitator/s created and fostered an environment that supports, nurtures and empowers the active participation of all members of the support network?

\_\_\_\_\_

Reviewer's observations and comments on strategies used by facilitator/s.

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4. Does the facilitator/s elicit from the support network a perspective of what makes sense for this unique person?

\_\_\_\_\_

Reviewer's observations and comments on strategies used by facilitator/s.

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5. Degree to which the facilitator/s assisted the support network listen to, value and create a vision for the focus person?

\_\_\_\_\_

Reviewer's observations and comments on strategies used by facilitator/s.

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6. Follow-along meetings. Degree to which the facilitator/s assisted the support network implement and follow-through on the vision for the focus person?

\_\_\_\_\_

Reviewer's observations and comments on strategies used by facilitator/s.

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7. Are there particular skill areas the facilitator/s could strengthen?

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8. Comments:

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# EVALUATION OF PERSON-CENTERED PLANNING

Name of focus person: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of reviewer: \_\_\_\_\_

Date of review: \_\_\_\_\_

E=Excellent

G=Good

N=Needs work/Not yet

Facilitator Evaluation	<b>IS THE PLAN BASED ON:</b>	Reviewer Evaluation
_____	1. A positive view of the focus person's gifts and capacities?	_____
_____	2. The preferences and interests of the focus person?	_____
_____	3. The focus person's unique personality?	_____
_____	4. Critical issues in the focus person's life (for example, health, safety, physical assistance, reputation, etc.)?	_____
_____	5. An accurate reflection of the focus person's vision for the future	_____
_____	6. A vision that stretches beyond system alternatives?	_____
_____	7. A vision for the future rich enough to call the group to action?	_____

**AFTER PARTICIPATING IN PERSON-CENTERED PLANNING MEETINGS**

Facilitator Evaluation		Reviewer or Group Member Evaluations
_____	1. Do you feel a sense of promise and hope?	_____
_____	2. Do you feel like you know the focus person?	_____
_____	3. Do you have enough information to support the focus person?	_____
_____	4. Do you know what to do to support the focus person?	_____
_____	5. Is it easy for the focus person and circle of support to understand the plan (e.g., no jargon)?	_____
_____	6. Do you feel that the vision/plan will assist the focus person to :	
_____	a. Deepen and expand their network of relationships?	_____
_____	b. Contribute to community life?	_____
_____	c. Expand the number and type of valued social roles?	_____
_____	d. Increase the presence of the focus person in local community life?	_____
_____	e. Increase the focus person's experience of choice, control and self-determination?	_____
_____	7. Has the facilitator and circle of support assisted the focus person to discover a dream beyond their current living and work situation?	_____
_____	8. Do you think the action plan will help the focus person reach their vision for the future?	_____
_____	9. Is the action plan logical, easy to use and implement?	_____
_____	10. Does the plan prioritize support being provided by non-paid community members?	_____
_____	11. How did you feel after participating in the person-centered planning process?	_____

# EVALUATION OF PERSON-CENTERED PLANNING REVIEW OF FOLLOW-ALONG AND IMPLEMENTATION MEETINGS

Name of focus person: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of facilitator: \_\_\_\_\_

Name of reviewer: \_\_\_\_\_

Date of review: \_\_\_\_\_

E=Excellent

G=Good

N=Needs work/Not yet

Facilitator Evaluation		Reviewer or Group Member Evaluation
_____	1. Was the plan since the last meeting implemented as written? Give examples.	_____
_____	2. Was the plan revised to address any changes that occurred with the focus person and their circle of support? Give examples.	_____
_____	3. Were the changes incorporated and addressed in an updated action plan? Give examples.	_____
_____	4. Were the changes addressed in a timely manner? Give examples.	_____

\_\_\_\_\_ 5. Were ongoing relationships built with the circle of support so they will, on an on-going basis, participate in the work of the action plan? Give examples. \_\_\_\_\_

\_\_\_\_\_ 6. Were the actions referred against the long range vision? Were action steps identified toward the long range vision? Give examples. \_\_\_\_\_

\_\_\_\_\_ 7. Did the group identify others to invite to join the circle? Give examples. \_\_\_\_\_

**4. ADULT LEARNING PRINCIPLES  
TEACHING STRATEGIES & METHODS**

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The materials in this section describe teaching/learning strategies and methods that can be used when offering training and learning sessions. When planning your training and learning sessions, determine how the following strategies and methods can be incorporated to enhance the experience. Examples are included of when to use the strategies and methods. The teaching/learning methods described are: questioning, graphic organizing, and cooperative learning.

Each teaching/learning method includes:

- A description of the teaching/learning method
  - Purpose of the teaching/learning method
  - Instructor's role
  - Learner's role
  - Prior knowledge needed by the learner
  - Steps/stages/parts of the method
  - When to use the teaching/learning method
- 
-



# QUESTIONING

## DESCRIPTION OF THE TEACHING/LEARNING METHOD

“If the goal of education is to maximize the potential of students, it is imperative that educators use a variety of questions to expand students’ interest in themselves and society” (Coomer, Hittman, & Fedje, p. 182).

Questions take many forms, according to Coomer, Hittman & Fedje. They include the following:

- *Technical questions* have absolute, concrete, and readily available answers. Technical questions are limiting because they do not allow students to be active in their learning.
  1. *Cause and effect.* What are the effects of a particular action?
  2. *Facts.* Answering a question that can be readily attained.
  3. *Means-end.* Attempt to identify means, procedures, or methods to an identified end.
- *Conceptual or communicative questions* relate to what people think and believe. These questions are asked within the physical and social environment. The focus is on the analysis and clarification of concepts and interpretations.
- *Critical or emancipatory questions* query whether beliefs are defensible and true. Knowledge helps us critique meanings and beliefs in terms of truth and rationality. The process of decisions are analyzed, taught, and evaluated. There are no right-wrong or yes-no answers. Often these questions cannot be answered once and for all.

There are many components of a question, according to Strong, Hanson, and Silver. A question is a social act, a language act, a relationship, an invitation to think, and the process for seeking of an answer.

In The Question Matrix, Wiederhold discusses Bloom’s Taxonomy that is an accepted hierarchy of cognitive processing. This taxonomy identifies from lower to higher order questioning as follows: knowledge, comprehension, application, analysis, synthesis, and evaluations.

Instructors need to be mindful of the ethical responsibility they possess in the educational process. According to Coomer, Hittman, & Fedje, “teaching is an ethical activity by nature, some reasons for questioning are more ethical than others.” They go on to make the point “that questioning can be used in an unethical way to inhibit student’s participation in learning or at least not stimulate it. Sometimes questioning has been based upon the idea that learners are going to respond to the same material and the same technique in the same way” (p. 173).

## **PURPOSE**

- To allow the learner to explore physically, emotionally, intellectually, and morally.
- To stimulate and motivate the learner.
- To actively involve the learner in the learning process.
- To develop tools for communication and understanding.
- To develop skills for functioning in the present ever-evolving information age.
- To teach the learner how to think.
- To involve the learner in subject matter.
- To assist the learner to become critically aware of their world and its organization.
- To create meaning for the learner.

## **INSTRUCTOR'S ROLE**

- To have patience with the learner, wait, let them struggle, don't be a rescuer.
- To press the learner's understanding by raising questions of significance.
- To facilitate open, respectful, and non-judgmental environments.
- To validate all answers.
- To define clear goals and objectives for the learning experience. Stay on track.
- To model humility: you do not have to have all of the answers.
- To model questioning for the learner.
- To use a variety of types of questions in order to broaden the thinking skills of the learner.
- To offer the learner an opportunity to reflect on their answers and perhaps to develop more in-depth answers.

## **LEARNER'S ROLE**

- To respectfully engage in dialogue.
- To have patience with the questioning process.
- To continually reevaluate thinking and perspectives.
- To deliberate conscious efforts.
- To reflect on the question.

## **PRIOR KNOWLEDGE**

- General concepts of thinking.
- Practical ways of thinking.
- The place of the question within thinking.
- Types of questions to be raised at particular steps in the thinking strategies (The Book of Questions).
- Knowledge of the content of the question.

## **STEPS/STAGES/PARTS OF THE METHOD**

- Questioning is not a method. It is used as a tool in the context of other teaching methods.
- Instructors should ponder the following questions when developing teaching strategies:
  1. How do I decide what questions to ask?
  2. How do my current instructional strategies limit the development of the learner?
  3. How do the pre-planned questions encourage learners to think?

4. What are my potential contributions as an instructor who uses a pre-planning and examined view of questioning? (Coomer, Hittman, & Fedje, 173).

#### **WHEN TO USE**

- Questioning as a teaching method is appropriate for all learners, based on their age and developmental level.
- Questions are in every environment. The instructor should look for and utilize the questions generated in all environments.

# **GRAPHIC ORGANIZERS**

## **DESCRIPTION OF THE TEACHING/LEARNING METHOD**

Graphic organizers are strategic learning tools to be used in cooperative lessons to help learners organize thinking patterns. This instructional tool facilitates a concept-centered approach to learning as opposed to a factual role-memorization approach. Mastering these tools can empower learners to become self-directed learners (Bellanca, 1991).

Graphic organizers are creative tools that allow you to capture and integrate large quantities of information in small amounts of space. The type of information that can be captured through graphic organizers is endless. The information that is captured is recorded in colorful graphics and short phrases. According to Mafgulies, graphic organizing allows you to “record a great deal of information on one page and to show relationships between various concepts and ideas. This visual representation helps you to think about the subject in a global fashion and leads to the flexibility of your thinking” (1991, pg. 12).

Graphic organizing is a tool that can be used in many settings and applications. Through graphic organizing group members of all ages and abilities are empowered to share their knowledge and experience in order to identify and record information.

## **PURPOSE**

- To promote and develop the higher cognitive processes through reflecting, questioning, analyzing, evaluating, and gathering information.
- To help the learner evaluate and expand understanding about facts, concepts, thinking processes, and cooperative interaction.
- To encourage the learner to investigate and examine all possible sides of an issue.

## **INSTRUCTOR’S ROLE**

- To explain to the learner the concept of graphic organizers.
- To explain to the learner how graphic organizers will benefit them in their learning process.
- To demonstrate the process of the specific graphic organizer.
- To provide hands-on practice with the graphic organizer.
- To provide feedback to the learner on their use of the graphic organizer.
- To explain that each graphic organizer may have specific roles (Bellanca, 1992).
- To explain that each graphic organizer has different ways in which it is implemented.

## **LEARNER’S ROLE**

- To work cooperatively with others to develop thinking processes.
- To investigate, examine, and question all sides of an issue.
- To develop critical awareness.
- To become a self-directed learner.

### **PRIOR KNOWLEDGE**

- Cooperative group skills.
- Have background knowledge on the selected topic for the discussion.

### **STEPS/STAGES/PARTS OF THE METHOD**

Each specific graphic organizer may have its own steps/stages/parts.

- Select a topic for investigation and evaluation.
- Describe the process and use.
- Divide the learners into small cooperative work groups.
- Direct the learner to list the pluses of the specific topic.
- Direct the learner to list the minuses of the specific topic.
- Direct the learner to generate a list of interesting questions.
- Encourage the learner to play the role of the devil's advocate.
- Discuss all sides of the issue.

### **WHEN TO USE**

- To assist the learner to evaluate both sides of a controversial issue. This process would be especially helpful with controversial issues in order to look at many sides of an issue.
- To facilitate discussion and critical examination of different points of view regarding a specific issue.

# COOPERATIVE LEARNING

“On July 15, 1982, Don Bennet, a Seattle businessman was the first amputee ever to climb Mount Rainier. He climbed 14,410 feet on one leg and two crutches. It took him five days. When asked to state the most important lesson he learned from doing so, without hesitation he said, ‘*You can’t do it alone.*’” (Krouzes & Posner, 1987).

## DESCRIPTION

Cooperative learning is working together to accomplish shared goals. Within cooperative activities individuals seek outcomes that are beneficial to themselves and beneficial to all other group members. Cooperative learning is the instructional use of small groups so that students work together to maximize their own and each other’s learning. Students are given two responsibilities: to learn the assigned material and to make sure that all other members of their group do likewise. In cooperative learning situations, students perceive that they can reach their learning goals only if the other students in the learning group do so also. Students discuss the material to be learned with each other, help and assist each other to understand it, and encourage each other to work hard (Johnson, Johnson, & Holubee, 1990).

## PURPOSE

- To enhance learning.
- To feel better about themselves.
- To get along better with others.
- To fulfill academic as well as fulfill social skills objectives.
- To increase participant learning (research shows cooperative learning works better than competitive or individualistic learning) (Johnson & Johnson, 1989).

## TEACHERS ROLE

- Being a guide on the side.
- Explain the task and specify the positive interdependence.
- Specify objectives for the lesson.
- Make a number of pre-instructional decisions.
- Monitor student’s learning. *Observe* (don’t go for coffee!)
- Read “*Cooperation in the Classroom*” teaching materials with care.
- Evaluate student’s learning and help students process how well their groups functioned.
- Plan and teach at least one cooperative lesson each week.
- Plan and teach at least five cooperative skills over the course (examples – using quiet voices and staying with the group).
- Avoid asking questions that can be answered “yes” or “no.”
- Feedback given to students should be descriptive and specific, not evaluative or general.

## **LEARNER'S ROLE**

- Learn assigned material
- Make sure all other group members learn material.
- Listen accurately.
- Criticize *ideas* not *people*.
- Participate actively.
- Not change your mind unless logically persuaded to do so.
- Students need to reflect on their learning.
- Learner's hidden thinking processes become overt and subject to observation and commentary.

## **PRIOR KNOWLEDGE**

- Communication skills.
- Decision-making skills.
- Trust building skills.
- Leadership skills.
- Conflict management skills.

## **STEPS/STAGES/PARTS OF THE METHOD**

The essential elements of cooperation must be understood for this to work.

- Positive interdependence – students must believe they sink or swim together.
- Face to face promotion of one another.
- Individual accountability.
- Social skills (leadership, decision making, trust building, communication, conflict management).
- Process how well the group functioned.

## **WHEN TO USE**

- Informal                    3-5 minute focused discussions before and after the lecture  
                                     2-3 minute turn-to-your partner discussions interspersed throughout a lecture.
- Formal                      One class period – several weeks. Teach specific content, ensure active cognitive processing. Provide long term support.
- Specific examples:
  1. Advocacy – learning to advocate for yourself as well as others.
  - 2.
  - 3.
  - 4.

## **5. TRAINING FACILITATORS ABOUT FOLLOW-ALONG AND IMPLEMENTATION**



# **TRAINING FACILITATORS IN LEADING FOLLOW-ALONG MEETINGS/IMPLEMENTING PLANS**

## **FORMATS AND METHODS**

Many different methods and formats are possible for providing input and strengthening a facilitator's skills over time. These methods include:

1. Co-facilitating a meeting

Especially the first few times, the trainer and facilitator can co-lead the follow-up meeting.

2. Feedback after the meeting

The trainer can take notes during the meeting and meet privately with the facilitator afterward to provide feedback and discuss together what went well and what could be improved next time.

3. Feedback/suggestions during a meeting

The trainer can make suggestions during the meeting especially if the trainer and facilitator have an easy back-and-forth style that works in a particular circle.

4. Planning a meeting ahead of time

It makes a difference to meet ahead of time and plan what should be covered at the follow-up meeting, rather than "walking in cold." It also makes a difference for the facilitator to meet with a key person from the circle to align on what should be covered at a particular follow-up meeting.

5. On-going mentoring

## AREAS TO EVALUATE

In terms of strengthening a facilitator's skills and making progress in assisting a focus person move toward their vision, note the following items from the Facilitator Manual (Section 8: Follow-Along Meetings):

1. Is the vision poster clearly displayed at each and every meeting? Are the actions proposed and being referenced against this vision?
2. Should the vision be revisited? Was it not strong enough initially, or have the person's life circumstances changed such that it should be redone?
3. Is progress being made on the goals that are more easily achievable? Is there a sense of accomplishment?
4. Is progress also happening on the larger, more difficult parts of the vision that might take more substantial change to fulfill? Are at least small steps happening toward those?
5. How can the planning circle expand? Who else can be invited, especially community members?
6. At the end of each meeting, is a time set for the next get-together? Does this time frame make sense in terms of what people have committed to do? (Note that if there are many human services staff attending, they might think in terms of quarterly or semi-annual blocks of time, rather than authentically looking at what really makes sense.)
7. Are there celebrations that occur for appropriate events and accomplishments?

The trainer can also regularly use the "Process Review Checklist" and "Content Review Checklist" from Section 3 (pp. 37-48 of this manual) to evaluate different areas.

## **6. MUSIC AND GRAPHICS**

# GRAPHIC ORGANIZING, RECORDING, OR COMMUNICATION

Graphic organizing, recording, or communication is a creative tool that allows you to capture and integrate large quantities of information in small amounts of space. The type of information that can be captured through graphics is endless. The information that is captured is recorded in colorful graphics and short phrases. Graphic organizing, recording, or communication is a tool that can be used in many settings and applications. Through these methods, group members of all ages and abilities are empowered to share their knowledge, thoughts, and experience in order to identify and record information.

Trainees should be encouraged to:

- Practice-Practice-Practice!
- Enhance their skills by continuing to learn about graphic recording (see Recommended Reading About Graphics in this section)
- Develop their personal log of graphics symbols that can be used when facilitating Person-Centered Planning.
- See the examples of graphics in this section.

## EXAMPLES OF GRAPHIC ORGANIZING, RECORDING, OR COMMUNICATION TEACHING STRATEGIES

### 1. FEEL THE MOVEMENT

- |              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Materials    | <ul style="list-style-type: none"><li>• Colored markers</li><li>• Poster paper</li><li>• “Music-Five” (tape or CD), one minute selections of different pieces of music</li><li>• CD or tape player</li></ul>                                                                                                                                                                                                                                                                                                                                                                          |
| Instructions | <ul style="list-style-type: none"><li>• Ask the trainees to take one piece of poster paper and a selection of markers. The trainees can get comfortable at a table, on the floor, or tape the poster paper on a wall.</li><li>• Ask the trainees to get comfortable and get ready to hear five one-minute selections of music. They will listen to the music and draw what they feel.</li><li>• The instructor will play the five one-minute selections of music.</li><li>• When the music stops, the instructor will ask the trainees what they learned from the activity.</li></ul> |

## 2. DRAW THE WORD

- Materials
- Poster paper
  - Markers
  - List of 20 words developed by the instructor
- Instructions
- Ask the trainees to take one piece of poster paper and a selection of markers. The trainees are asked to get comfortable at a table or on the floor, or tape the poster paper on the wall.
  - Ask the trainees to get ready to hear a list of words that they will capture in graphics.
  - The instructor reads the list of 20 words that they developed.
  - When the 20 words have been read by the instructor, he or she will ask the trainees what they learned from the activity.

## 3. DRAW THE WORD

- Materials
- Poster paper
  - Markers
  - Select a story to read – example: The Big Orange Splot
- Instructions
- Ask the trainees to take one piece of poster paper and a selection of markers. The trainees can get comfortable at a table, on the floor, or tape the poster paper on a wall.
  - Ask the trainees to get comfortable and to get ready to hear a story that they will capture in graphics.
  - The instructor will read the trainees a story for approximately five to seven minutes.
  - When the five to seven minutes is up the instructor will ask the trainees what they learned from the activity.

## 4. SHOW SOME BASIC TIPS

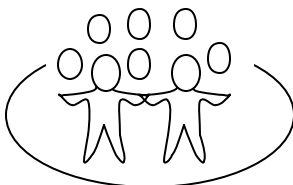
Adding a base “grounds” the person.



“Star” figures provide more flexibility to show movement than “stick” figures.



It’s easy to use lots of circle to show a crowd.



# MUSIC

Music is a powerful tool that can be used to enhance the learning for trainees and set the tone for the learning experience. When planning your training and learning sessions, identify times and activities where music can be included, such as:

- To set the mood.
- At the beginning and at the end of the training and learning experience.
- During breaks.
- To draw participants back to a large group activity.
- As background during cooperative and individual activities.

When planning your training and learning sessions, incorporate a variety of music to enhance the learning for the participants. Ask participants what types of music they would like to hear during the learning experience. Ask participants to bring music to the learning experience they would like to hear. Share your favorite music with the participants.

The following is a list of favorite music used by Marsha Forest and Jack Pearpoint.

## MUSICAL RESOURCES



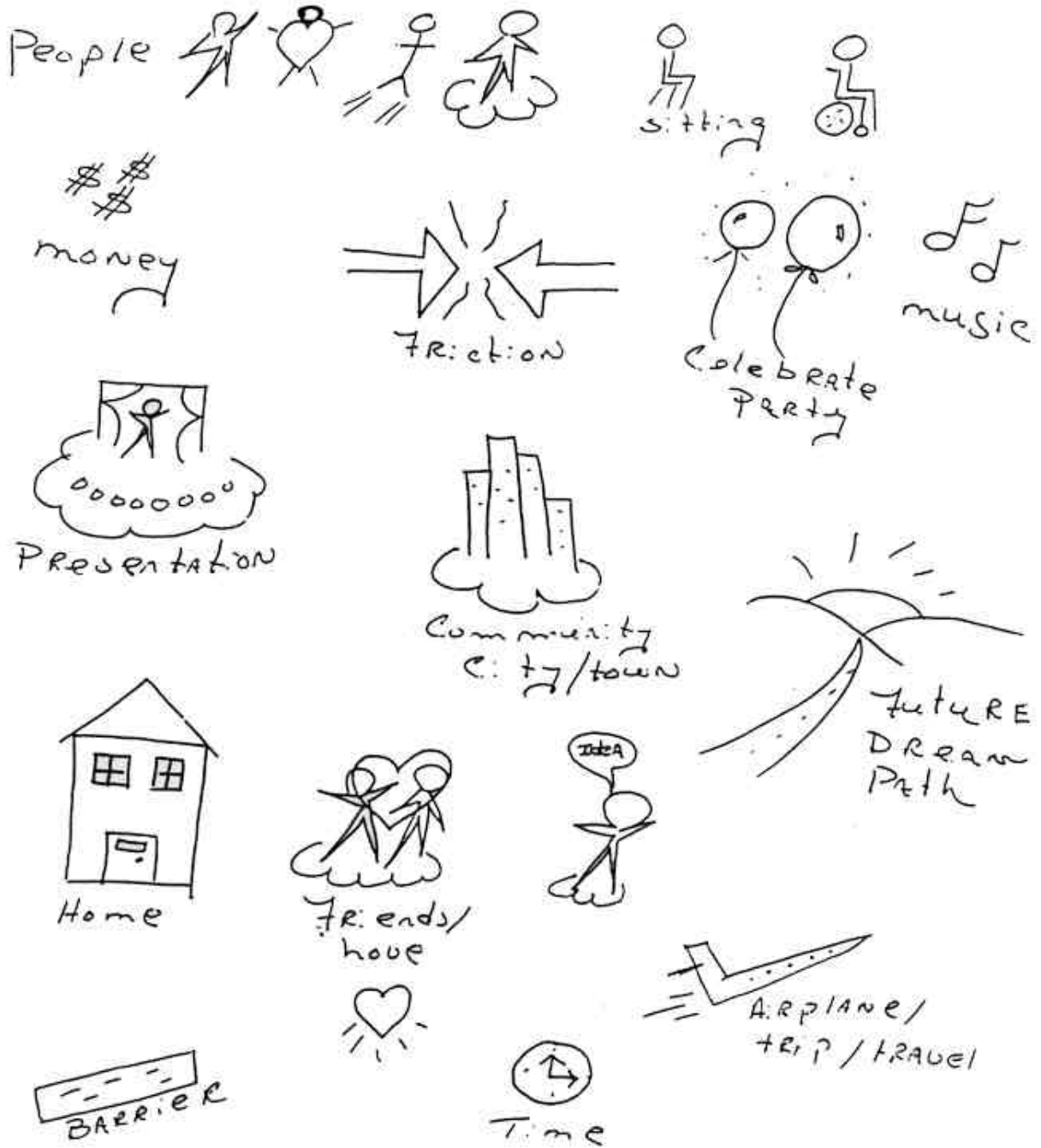
We are frequently asked how to get the music we use at our workshops. We are pleased to provide the information. We love the atmosphere set by the following tapes:

- Anything by Carlos Nakai and his Native American Flute Music is wonderful. Our two favorites are the tapes "Journeys" and "Changes."
- Strutz and Farah: "Americas," "Mosaico," or "Primal Magic." (Masa Records).
- Another popular tape is "Baka Beyond Spirit of the Forest." (Rykodisk).
- "Outback" is also on the Rykodisk label.
- Otmar Liebert plus Luna Negra is on the Sony label.

Create your personal list of favorite music:

- 1.
- 2.
- 3.
- 4.

# EXAMPLES OF GRAPHICS



## RECOMMENDED READING ABOUT GRAPHICS

- Beyond Words: A Guide to Drawing Out Ideas  
Milly R. Souneman  
Ten Speed Press  
P.O. Box 7123  
Berkeley, CA 94707
- Graphic Facilitation, I See What You Mean, Fundamentals of Graphic Language  
David Sibbet  
The Grove Consultants International  
832 Folsom St., Suite 810  
San Francisco, CA 94107  
Telephone (800) 49GROVE or (415) 882-7760  
Fax (415) 543-2021
- Inclusion Press Publications and Videos  
Inclusion Press International  
24 Thome Crescent  
Toronto, Ontario M6H 2S5 Canada  
Tel: 416-658-5363  
Fax: 416-658-5067  
[www.inclusion.com](http://www.inclusion.com)
- Mapping Inner Space  
And  
MAPS, MINDSCAPES, AND MORE (Video)  
Zephyr Press  
P.O. Box 66066-W  
Tucson, AZ 85728-6006
- Open Space Technology  
Harrison Owens: Abbott Publishing  
7808 River Falls Drive  
Potomac, MD 20854
- The Fifth Discipline  
by Peter Senge, Doubleday, 1990



# **PERSONAL LOG OF GRAPHICS**

## **7. OVERHEADS AND HANDOUTS**

*This is a wide selection. Each trainer should select the materials he/she wishes to use, depending on the training format, group, and trainer's style. Materials may be used as overheads, handouts, or both. Copyrighted materials require permission to use before copying and distribution.*

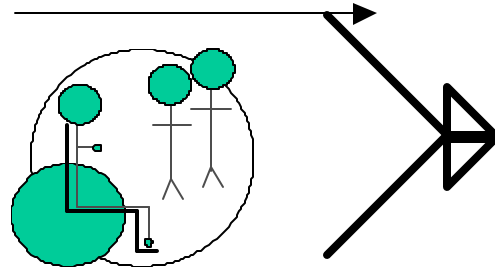
## **OVERHEADS AND HANDOUTS**

### **A. PRINCIPLES OF PERSON-CENTERED PLANNING**

# THE PURPOSE OF HUMAN SERVICES FOR PEOPLE WHO REQUIRE LONG TERM SUPPORT

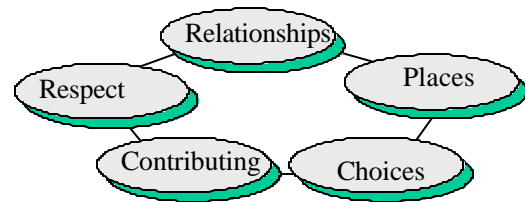
To help people discover and move toward a desirable personal future.

- Discovering a vision.
- Creating opportunities.
- Delivering support.



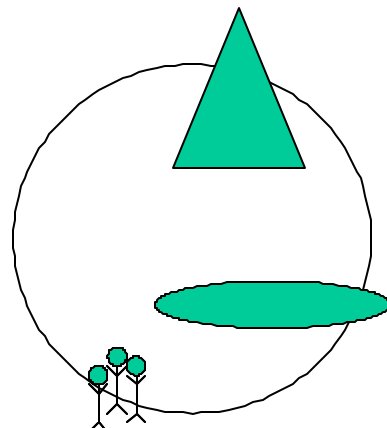
To offer needed help in ways that protect and promote valued experiences now:

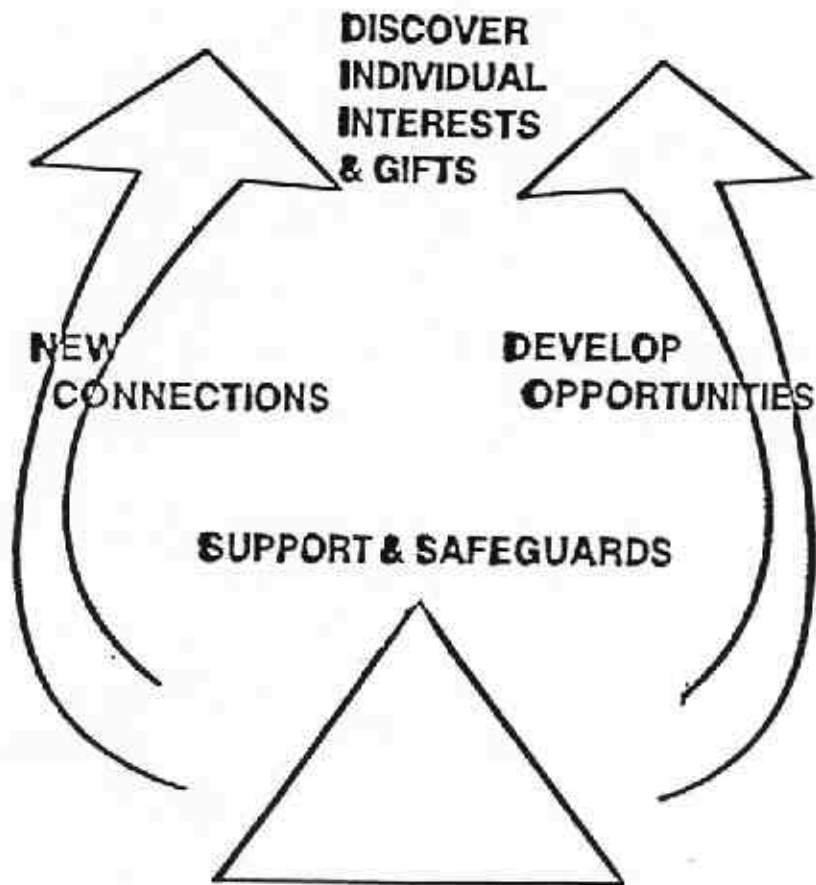
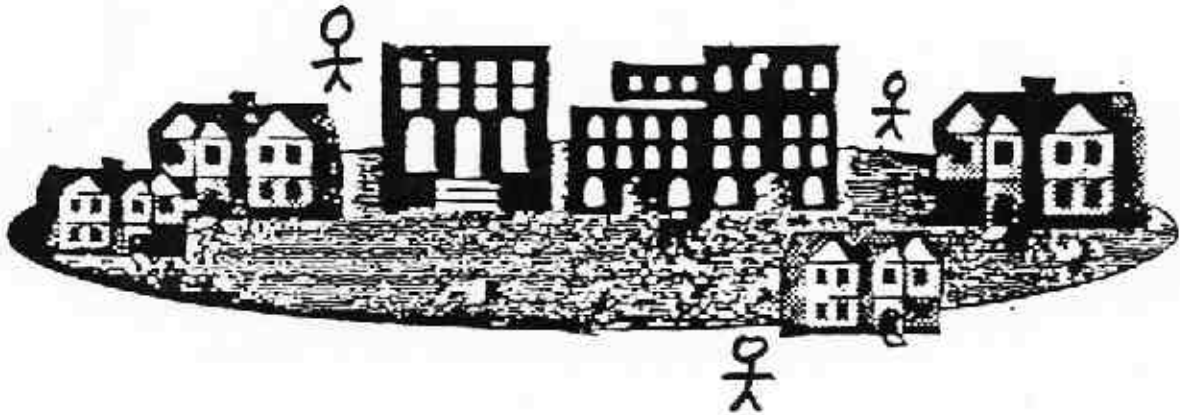
- Growing in personal relationships.
- Sharing ordinary community places & activities.
- Contributing
- Making choices.
- Being treated with respect and having a valued social role.

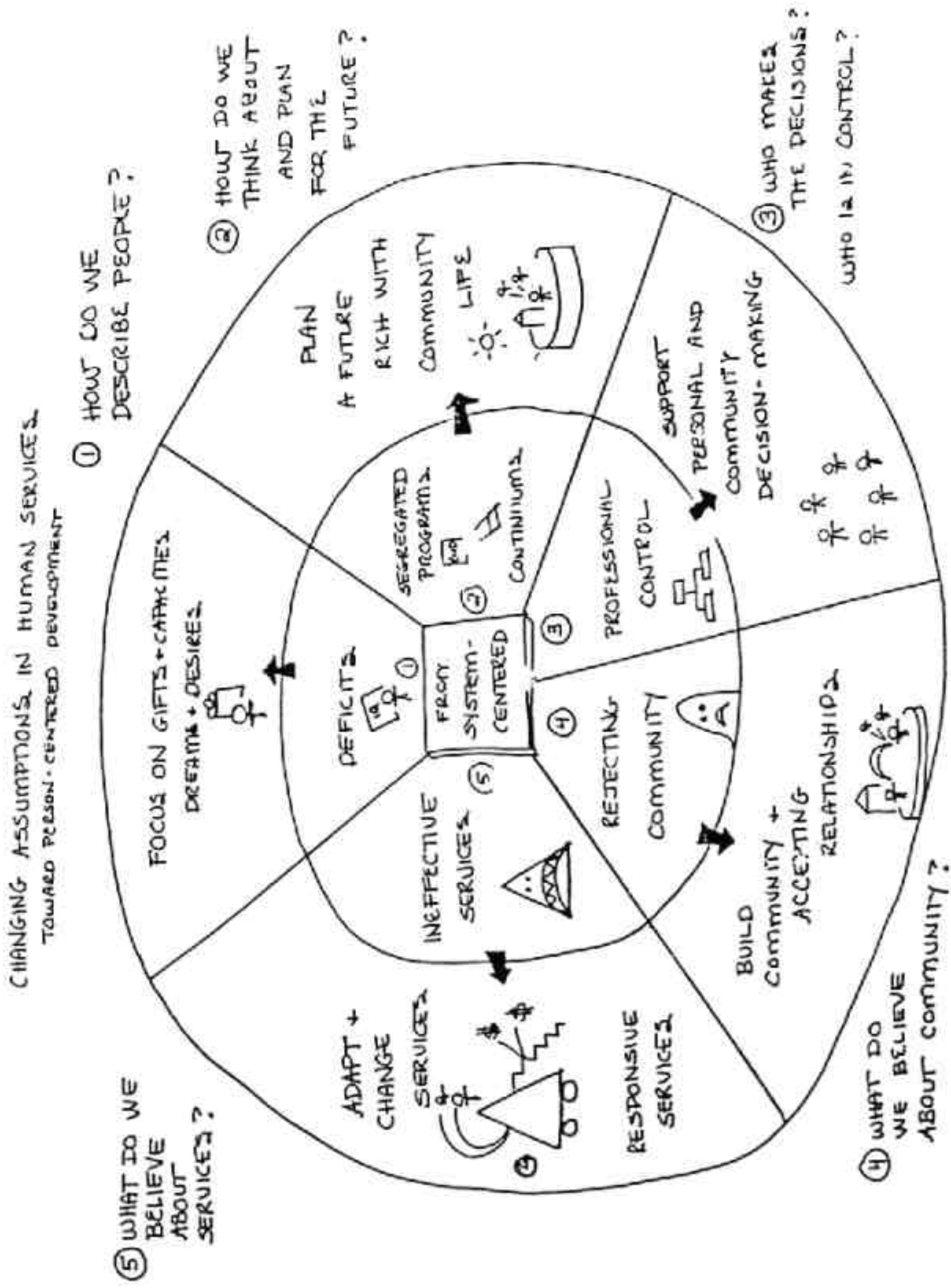


To offer needed help in ways that support and strengthen community competence:

- Supporting family and friends who care.
- Strengthening links to community networks.
- Expanding membership in community associations.  
Increasing the openness of the local economy.
- Improving the effectiveness and inclusiveness of services and benefits available to all local citizens.







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# HOW DO WE DESCRIBE PEOPLE?

From

Toward

## System-Centered

- Focus on labels
- Emphasis on deficits, needs
- Invest in standardized testing and assessments
- Depend on professionals to make judgments
- Generate written reports
- See people in the context of human service systems
- Distance people by emphasizing difference

## Person-Centered

- See people first
- Search for capacities, gifts
- Spend more time getting to know people
- Depend on people, families and direct service workers to build good descriptions
- Gather folklore from people who know person well
- See people in the context of their local community
- Bring people together by discovering common experience

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# HOW DO WE THINK ABOUT AND PLAN FOR THE FUTURE?

From

Toward

## System-Centered

- Plan a lifetime of programs
- Offer limited number of usually segregated program options
- Base options on stereotypes about people with disabilities
- Focus on filling slots, beds, placements, closures
- Overemphasize technologies and clinical strategies
- Organize to please funders, regulators, policies and rules

## Person-Centered

- Craft a desirable lifestyle
- Design an unlimited number of desirable experiences
- Find new possibilities for each person
- Focus on quality life
- Emphasize dreams, desires, and meaningful experiences
- Organize to respond to people

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# WHO MAKES THE DECISIONS?

From

## System-Centered

- Professional control  
Professional knows best
- Delegate work to direct service workers
- Rely on standardized interdisciplinary teams to generate plans
- Organize efforts in conference rooms for the convenience of professionals
- Take action to follow rules and regulations
- Spend lots of time planning with little time to take action
- Respond to need based on job description
- Create distance through process

# WHO IS IN CONTROL?

Toward

## Person-Centered

- Shared decisions with person, family & friends
- Empower direct service workers to make good decisions
- Create person-centered teams to solve problems
- Organize efforts in community to include person, family and direct service workers
- Reflect together as a basis for setting priorities
- Spend lots of time taking action, with regular times to reflect
- Respond to people based on shared responsibility
- Share struggle by working together

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# WHAT DO WE BELIEVE ABOUT COMMUNITY?

From

Toward

## System-Centered

- Community is rejecting
- Protect and congregate people with labels
- Focus on fearful, dangerous, and exploitative side of community
- Simulate safety in segregated setting
- Avoid prejudice by reinforcing segregation
- Seek quick-fix solutions that reinforce rejection

## Person-Centered

- Community can be welcoming
- Negotiate acceptance by building relationships
- Find safety and build trust networks
- Find associations, settings, and people who facilitate new experiences
- Invite involvement by finding and building open spaces
- Invest in long term commitment to build openness in local community life

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# WHAT DO WE BELIEVE ABOUT SERVICE SYSTEMS?

From

Toward

## System-Centered

- Services are not responsive to individual needs
- Services exist to maintain the interest of professionals
- Budgets are structured to maintain investments in building and property
- Services are hopelessly entangled by bureaucratic complexity
- Services are impersonal
- Services hurt more than they help
- Quality depends on bureaucratic safeguards
- New initiatives are only worthy if they can be quickly implemented on a large scale basis

## Person-Centered

- Services can adapt and respond to people
- Resources can be distributed to serve the interest of people
- Budgets can be structured to provide individualized packages of support to people
- People paid by service systems can be supported as they learn to respond to people in a more personal way
- People paid by service systems can provide caring, personal support
- Services can provide support that people find helpful
- Quality depends on good information and creativity
- Initiatives are worthy even if they must start small and develop over time

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## WHAT IS PERSON CENTERED PLANNING?

*Many people phone and ask us, "What is person centered planning?" John O'Brien and Herb Lovett, two of our dearest friends and work colleagues, wrote a 19 page pamphlet published by Nancy Thaler of the Pennsylvania Office of Mental Retardation. We have taken a few excerpts from that pamphlet to answer the question. For the whole pamphlet: Finding A Way Toward Everyday Lives, phone Human Policy Press at 315-443-2761.*

*John O'Brien and Herbert Lovett.*

The term, person centered planning, refers to a family of approaches to organizing and guiding community change in alliance with people with disabilities and their families and friends. Person Centered planning approaches include: Individual Service Design, Lifestyle Planning, Personal Futures Planning, MAPS, PATH, and Essential Lifestyle Planning.

Those who want can find many ways to avoid engaging the tension between current reality and a desirable personal future. They can compare the present to worse past conditions instead of comparing it to desirable future capacities. They can dismiss the image of a desirable future as unrealistic. They can say that they would like to help but that powerful outside forces forbid them. They can stay busy with activities that allow no time to listen and learn from focus people.

Each approach to person centered planning has distinctive practices, but all share a common foundation of beliefs:

- The person at the focus of planning, and those who love the person, are the primary authorities on the person's life direction.

The essential questions are: 'Who is this person?' and 'What community opportunities will enable this person to pursue his or her interests in a positive way?'

- The purpose of person centered planning is learning through shared action.
- Person centered planning aims to change common patterns of community life. Person centered planning stimulates community hospitality and enlists community members in assisting focus people to define and work toward a desirable future.
- Person centered planning requires collaborative action and fundamentally challenges practices that separate people and perpetuate controlling relationships.
- Honest person centered planning can only come from respect for the dignity and completeness of the focus person.
- Assisting people to define and pursue a desirable future tests one's clarity, commitment and courage.

Person centered planning engages powerful emotional and ethical issues and calls for sustained search for effective ways to deal with difficult barriers and conflicting demands. Those who treat person centered planning simply as a technique and those who fail to provide for their own development and support will offer little benefit to the people they plan with.

Person centered planning provides a systematic way to learn from sustained

action over the months and years necessary for development. If the process is successful, people's sense of a desirable future will evolve. One of the most common misunderstandings of person centered planning is that it is a short series of meetings whose purpose is to produce a static plan. This misunderstanding leads people to underestimate the time, effort, uncertainty, anxiety, and surprise necessary to accurately support people's lives over time.

Person centered planning is not a "quick fix" for people's difficulties. And when things do work well, the lessons don't necessarily generalize widely. What seems to be one person's dreams could easily be another's nightmare. In this sense person centered planning accurately reflects ordinary life

Person centered planning can invite, align, and direct shared efforts to create positive community roles for people with disabilities. It allows people to exercise their practical wisdom to work for more inclusive, more just communities.

To support their work and its improvement, people involved in person centered planning need to extend their network of relationships across the different approaches to person centered planning, community development, and service reform. The future of person centered planning depends on their willingness and ability to improve their practice through critical reflection on the effects of their work in the lives of people with disabilities and their families.

The term

## **"Person-Centered Planning"**

refers to:

a family of approaches to  
organizing and guiding  
community change in alliance  
with people with disabilities and  
their families and friends

# COMMON FOUNDATION OF BELIEFS TO ALL PERSON-CENTERED PLANNING APPROACHES

- The person at the focus of planning, and those who love the person, are the primary authorities on the person's life direction
- Essential questions are:
  1. Who is the person?
  2. What community opportunities will enable this person to pursue his/her interests in a positive way?
- The purpose of Person-Centered Planning is learning through shared action
- Person-Centered Planning aims to change common patterns of community life
  - stimulate community hospitality
  - enlist community members in assisting focus person to define and work toward a desirable future
- Person-Centered Planning requires collaborative action
- Person-Centered Planning fundamentally challenges practices that separate people and perpetuate controlling relationships
- Honest Person-Centered Planning can only come from respect for the dignity and completeness of the focus person
- Assisting people to define and pursue a desirable future tests one's clarity, commitment and courage

## **FEATURES OF PERSON-CENTERED PLANNING APPROACHES**

- Focus on preferences, talents and dreams
- Emphasis on contribution and participation of person and significant others in process
- Define unrestricted vision of lifestyle the individual would like
- Organizing resources that are as local, informal, generic and "non-professional" as possible
- Emphasis on settings, services, routines, and supports available in community at large
- Approach to planning process that tolerates uncertainty, setbacks, false starts and disagreements

# DIFFERENT KINDS OF PLANNING

- Essential Lifestyle Planning

Understanding how a person wants to live

- Personal Futures Planning

Developing a dream from a deep understanding of a person

Variations:

- ◆ MAPS (McGill Action Planning System – used especially in schools)
- ◆ Whole Life Planning
- ◆ Career Planning

- PATH (Planning Alternative Tomorrows with Hope)

Action steps toward implementation of a dream



**OVERHEADS AND HANDOUTS**

**B. QUALITIES OF A FACILITATOR**

# Basic Values and Assumptions

- Listening
- Creativity
- Commitment
- Discovery
- Community
- Challenge

## **The Facilitator as a Community Builder**

---

- The facilitator inspires a future vision for life in the community.
- The facilitator is not a spokesperson for services that are a barrier to community membership.
- The facilitator constantly looks for ways that ordinary people can make a difference in the course of everyday life.
- The facilitator is not "frozen" by system issues and inadequate resources.
- The facilitator knows how to help people tell stories and dream, argue and fuss over what to do, and laugh and cry in the process.
- The facilitator has not given up on the capacity of fellow human beings and is not resigned to live with the status quo.

The futures planning process is more like a living room-based jam session for anybody on the block who is interested led by whoever is crazy enough to take charge of a rowdy group.

From *Making Futures Happen* by Beth Mount

## **The Facilitator as a Community Builder**

*How do Personal Futures Planning meetings  
reflect the spirit of community*

- They are usually held in a comfortable place in the neighborhood of the person asking for help.
- People qualify to attend by being interested. They are neighbors, family members, friends, and human service workers.
- They often meet in the evening, if that time is the easiest for everyone to get together.
- Someone prepares something to eat and drink.
- People wear blue jeans and tennis shoes.
- The facilitator keeps a focus for the group in a way that allows people to cut loose.
- Children and pets are known to roam around the room.
- The person with a disability is central to the meeting.
- People gossip, take breaks, and are usually late coming back together.

From *Making Futures Happen* by Beth Mount

# Some Logistical Considerations

- Never underestimate the skills of a good facilitator.
- Wallpaper and markers can open the doors to a new world
- There are many good walls--but few great ones.
- It's hard to find the vision in the human service world.
- The person whose life is being focused upon has the loudest voice.
- Required for admission--a personal relationship.
- Of all the meetings you might choose to--or need to--attend, this one will be worth it.

**OVERHEADS AND HANDOUTS:**

**C. BASIC INFORMATION ON PERSONAL  
FUTURES PLANNING**

## What is Personal Futures Planning?

- A creative process designed to help a group of people craft a life of meaning and contribution for the person who is the focus of the planning.
- Personal Futures Planning is not just another technique to be added to the human service industry of fashionable fixes.
- Meaningful Futures Plans are not constructed carelessly or mass-produced.
- Personal Futures Planning is an ongoing process of mutual education, discovery and adventure.
- An effective Futures Plan should inspire people to act on behalf of the person with a disability.

From *Making Futures Happen* by Beth Mount

# Personal Futures Planning

## Is not:

- new way to do Individual Service Plan
- new assessment process
- substitute for assessment in IPP
- different way to do staffings

## What it is:

A process for  
discovering  
capacity and

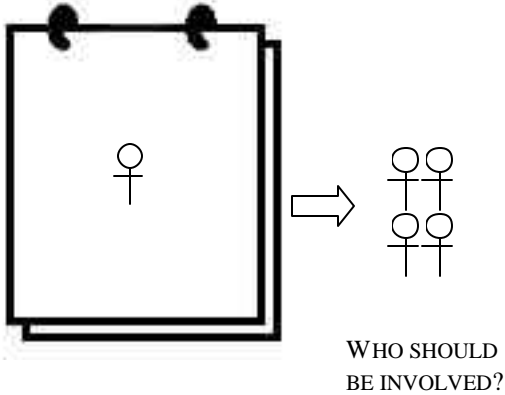


making connections between people and  
their communities

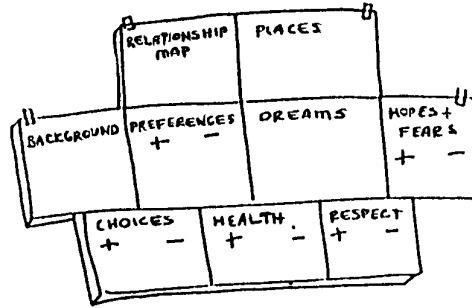


# FOUR BASIC MEETING FRAMEWORKS

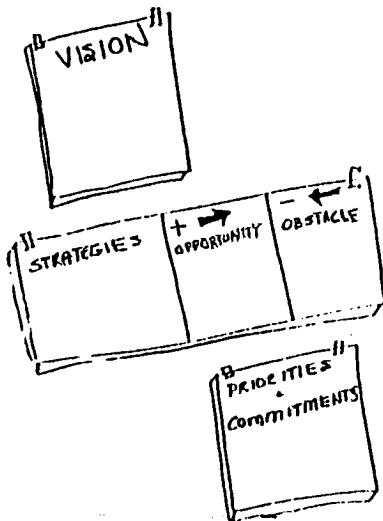
1. EXPLORING COMMITMENT:  
WHO SHOULD BE INVOLVED?



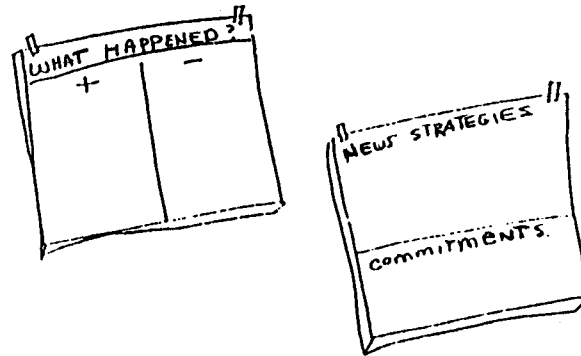
2. DISCOVERING OPPORTUNITIES:  
THE PERSONAL PROFILE



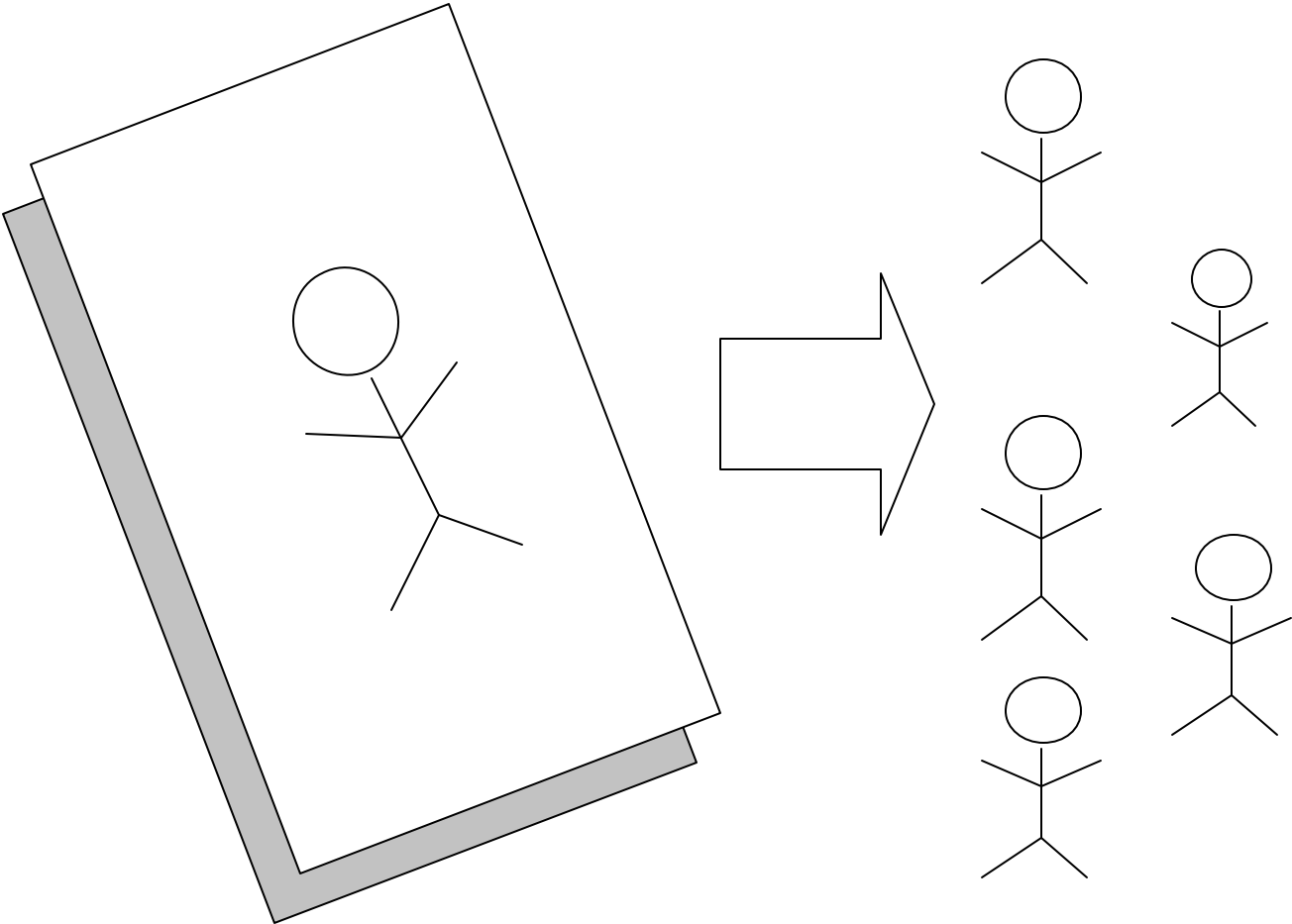
3. FINDING NEW DIRECTIONS:  
THE PLANNING MEETING



4. TAKING ACTION:  
SOLVING PROBLEMS OVER TIME



# EXPLORING COMMITMENT: WHO SHOULD BE INVOLVED?



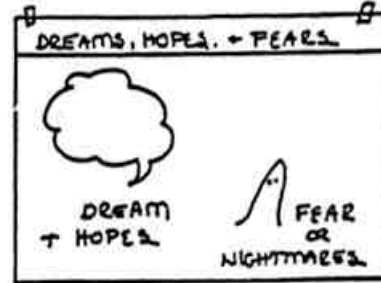
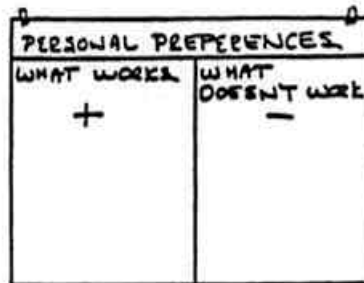
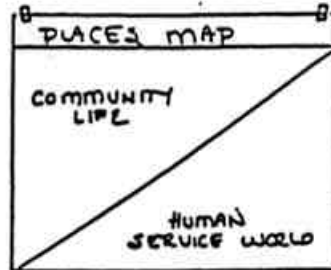
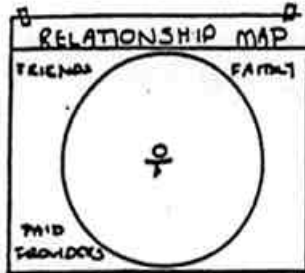
**RELATIONSHIP MAP**

**OVERHEADS AND HANDOUTS:**

**D. FUTURES PLANNING - PERSONAL  
PROFILE MEETING CHARTS**

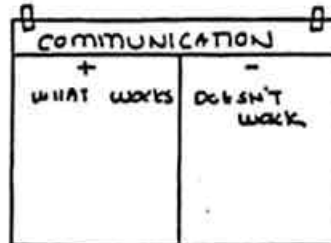
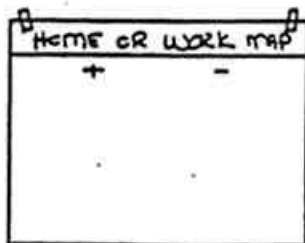
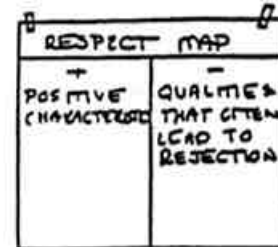
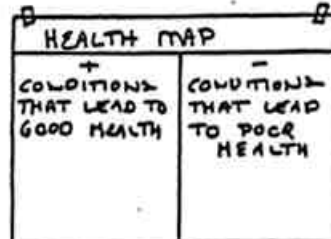
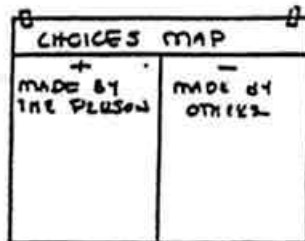
## A FRAMEWORK FOR EXPLORATION: THE PERSONAL PROFILE

### BASIC FRAMEWORKS




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### OPTIONAL FRAMEWORKS



# THE PERSONAL PROFILE

## BASIC FRAMEWORKS for getting to know the focus person

Relationship Map *Identifies opportunities for personal support and assistance*

- Helps to illustrate the most important people in the focus person's life. People interested in planning together over time, and opportunities for building relationships.

Places Map *Describes the pattern of current daily life.*

- Helps to illustrate how the focus person spends her time. How much time is spent in segregated or community settings, and existing opportunities for building community.

Background Map *Provides an overview of the life experience of the person and family.*

- Helps illustrate positive experiences from the past to build on. Appreciation of the traumas, loss, and grief in life. Celebration of accomplishments, and opportunities now as a result of the past.

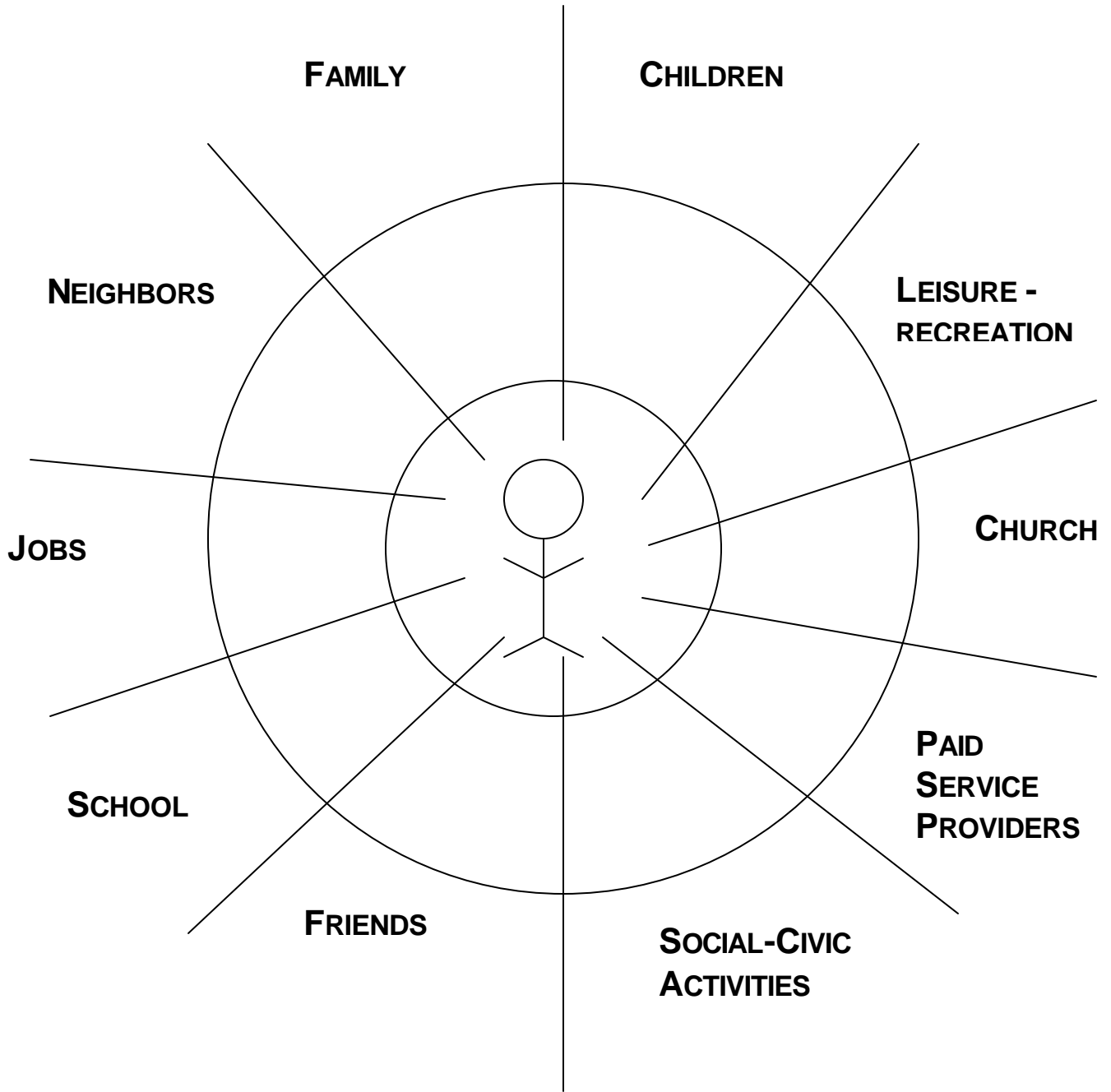
Preferences Map *Describes personal preferences, gifts and interests, as well as conditions to avoid.*

- Helps to illustrate patterns in the gifts, potential, and unique contributions of the person. Describes patterns in conditions that challenge development.

Dreams Map *Describes ideas about personal dreams and desires for the future. Describes how people feel about the opportunities and obstacles they see to making things happen.*

- Helps to understand inner images about desires, and both the hopes and fears about the future through the eyes of the focus person.

# RELATIONSHIP MAP



## **OVERHEADS AND HANDOUTS**

### **E. FUTURES PLANNING MEETING CHARTS**

**"NOTHING HAPPENS  
UNLESS FIRST A DREAM."**

- Carl Sandburg



# STRUCTURE FOR THE FUTURES PLANNING MEETING OUTLINE

Review the Personal Profile

Describe Trends in the Environment

+		-
Working with us		Working Against Us

Step 1: Describing What Is: Review Profiles

A Positive Future For....

Step 2: Images of the Future


Brainstorm

Step 3: Strategies

Start Here

- 1.
- 2.
- 3.
- 4.

Step 5: Priorities and  
Commitments



Step 6: Set next  
meeting time

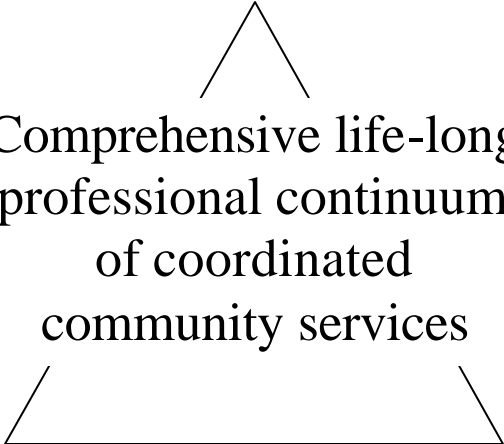
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Step 4: Obstacles and Opportunities

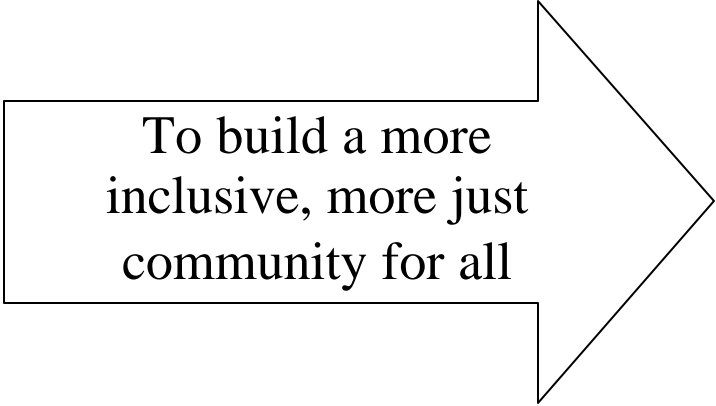
Step 7: Issues for  
Organizational/Systems Change

## How Do We Define A Desirable Future?

- Residential service
- Vocational service
- Recreation therapy
- Socialization skills training
- Retirement
- ISPs, IHPs, IEPs
- Active treatment
- Public Support for...
- Home
- A job
- Fun
- Friends
- Changes to learn
- Help as necessary
- Personal involvement and civic action to...



Comprehensive life-long  
professional continuum  
of coordinated  
community services



To build a more  
inclusive, more just  
community for all

## **Five Questions that Guide the Development of a Dream**

- How can we expand and deepen people's friendships?
- How can we increase the presence of a person in local community life?
- How can we help people have more control and choice in life?
- How can we enhance the reputation people have and increase the number of valued ways people can contribute in community life?
- How can we assist people to develop competencies?

From *Making Futures Happen* by Beth Mount

## CONTRASTING IMAGES OF THE FUTURE

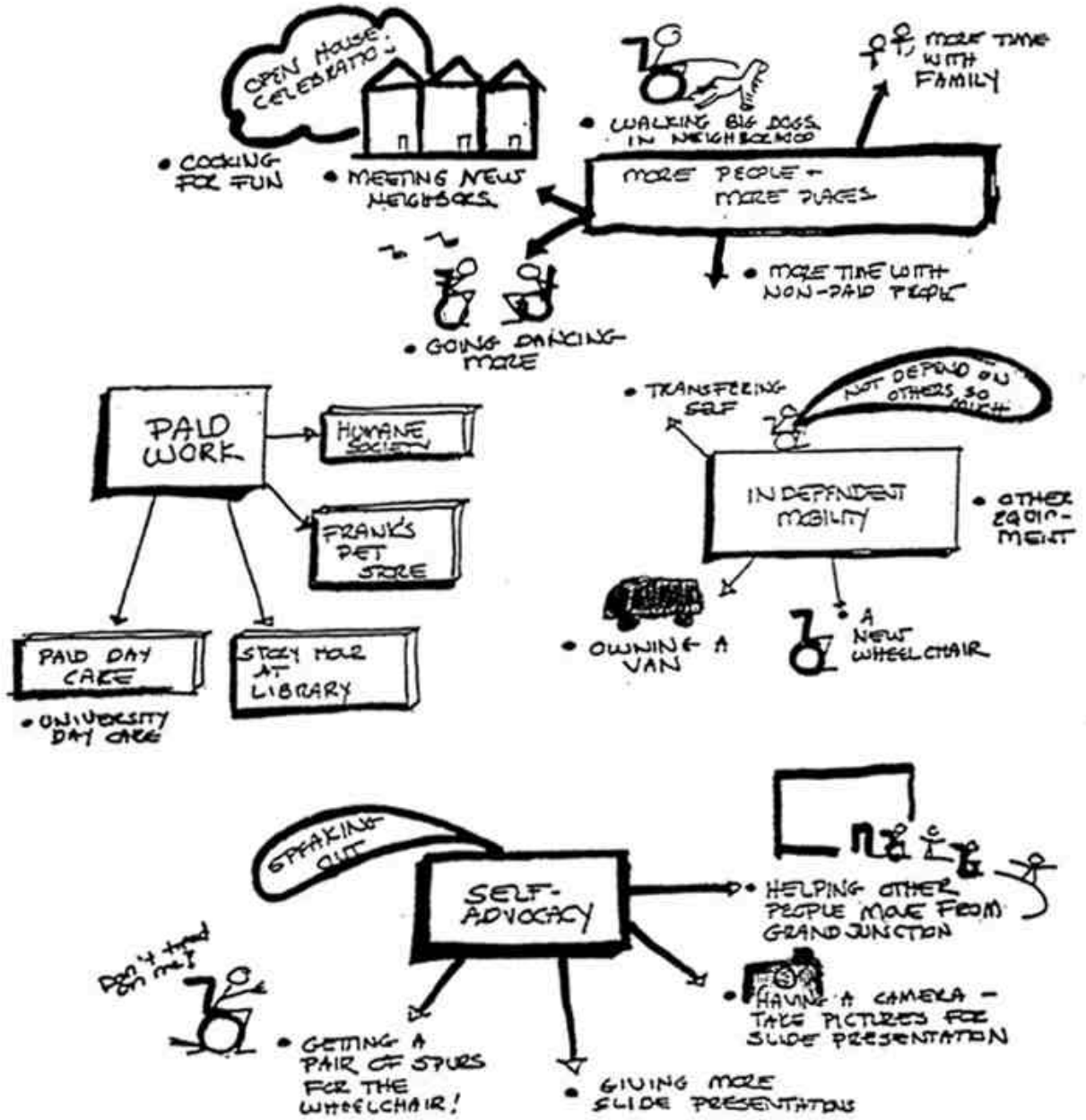
### CHARACTERISTICS OF TRADITIONAL PROGRAM PLANS

- Goals focus on specific negative behaviors of the focus person to change or **decrease**
- The plan identifies program categories and service options that are often **segregated**.
- Many goals and objectives reflect potentially **minor** accomplishments that can be attained within existing programs without making any changes
- These plans will look **similar** to the plans and ideas written for other people.
- These plans will probably not even mention personal relationships or community life

### CHARACTERISTICS OF A POSITIVE FUTURE WORTH WORKING FOR

- Images of future contain specific, concrete examples of positive activities, experiences, and life situations to **increase**
- Ideas and possibilities reflect specific **community** sites and settings and valued roles within those settings.
- Some ideas will seem far out, unrealistic, and impractical, and will require **major** changes in existing patterns such as: funding categories, service options, how people (and staff) spend their time, shared decision making, where people live and work, etc.
- These plans will really reflect the (**unique**) interests, gifts, and qualities of the person, and the unique characteristic, settings, and life of the local community.
- These ideas will emphasize creative ways to focus on the development and deepening of **personal relationships** and community life.

# EXPERIENCES WE WANT ALICE TO HAVE MORE OF:



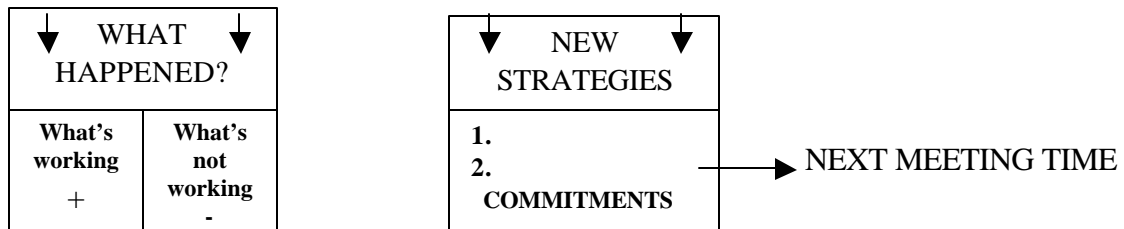
## **OVERHEADS AND HANDOUTS**

### **F. FOLLOW-ALONG SESSIONS**

## TASK: FOLLOW ALONG MEETINGS AND RENEWAL ACTIVITIES

We've learned that heartfelt commitment and caring between people is central to facilitating change over time. While there is no way to mandate, control, or contrive these feelings, we can invite their development through the spirit and attention to the entire planning process.

The follow-along meetings help planning groups maintain their commitment to the focus person as well as learn from the process of implementation. A structure for follow-along meetings enables groups to review actions taken since the last meeting, both successful and less successful efforts. Following this review the group then brainstorms new strategies for action. The facilitator concludes this meeting by setting a date and time for the next meeting.



The follow-along meetings provide repeated occasions for group members to solve problems over time. Reviewing positive actions and outcomes on a regular basis is an important renewal strategy. The meeting format will vary since every planning group is different, requiring a strategy for follow-along that fits the energy, commitment, and developmental stage of itself in particular.

Facilitators need to remember that **maintaining the commitment of a group of people over time is one of the most challenging requirements of the futures planning process.** Do not underestimate the hard work required to bring a group of people together to solve problems again and again over time. Do recognize that inviting people to work together in a constructive manner toward a positive vision is one of the most important responsibilities of an effective facilitator.

# **ACTION STEP: DESIGN A STRATEGY FOR FOLLOW-ALONG**

From the very start of the planning process, the facilitator looks for people who agree to meet regularly to solve problems over time. The method for follow-along may vary from group to group as long as some continuity and commitment to the process is planned. The facilitator should consider these questions when designing a follow-along process.

## **1. Composing a Committed Intervisionary Team**

- Who are the most involved people who should be included in the group?
- How often should people meet to gain momentum in the process of change?
- How often should the facilitator meet individually with the focus person and/or family between meetings?

## **2. Follow-Along**

- What is the best method for follow-along for this group? What is the best meeting structure? Who will keep a record during the meeting?
- Should there be subcommittees or smaller brainstorming groups around certain issues? Can someone else lead these groups?

## **3. Increase Facilitation Skills**

- Who can facilitate the groups over time? Who can learn to facilitate the group in time? Are there two people who can work as partners to facilitate the group?
- What are the strengths of the facilitator?
- What are the areas for development for the facilitator?
- What are the best strategies for obtaining these skills?
- What would it take to support the focus person to lead his or her own group? Who could be their partner in such an effort?

## **4. Improve the Conditions that Increase the Likelihood of Implementation**

- Which of the ten conditions for change are in your favor?
- What are the areas for development?
- Develop a strategy for increasing the presence of these conditions.

Reprinted with permission of Beth Mount (1997) *Person-Centered Planning: Finding Directions for Change Using Personal Futures Planning*. New York, New York: Graphic Futures.



## **DISCOVERY: CREATING TEN CONDITIONS THAT INCREASE THE LIKELIHOOD THAT A POSITIVE FUTURE WILL BE IMPLEMENTED**

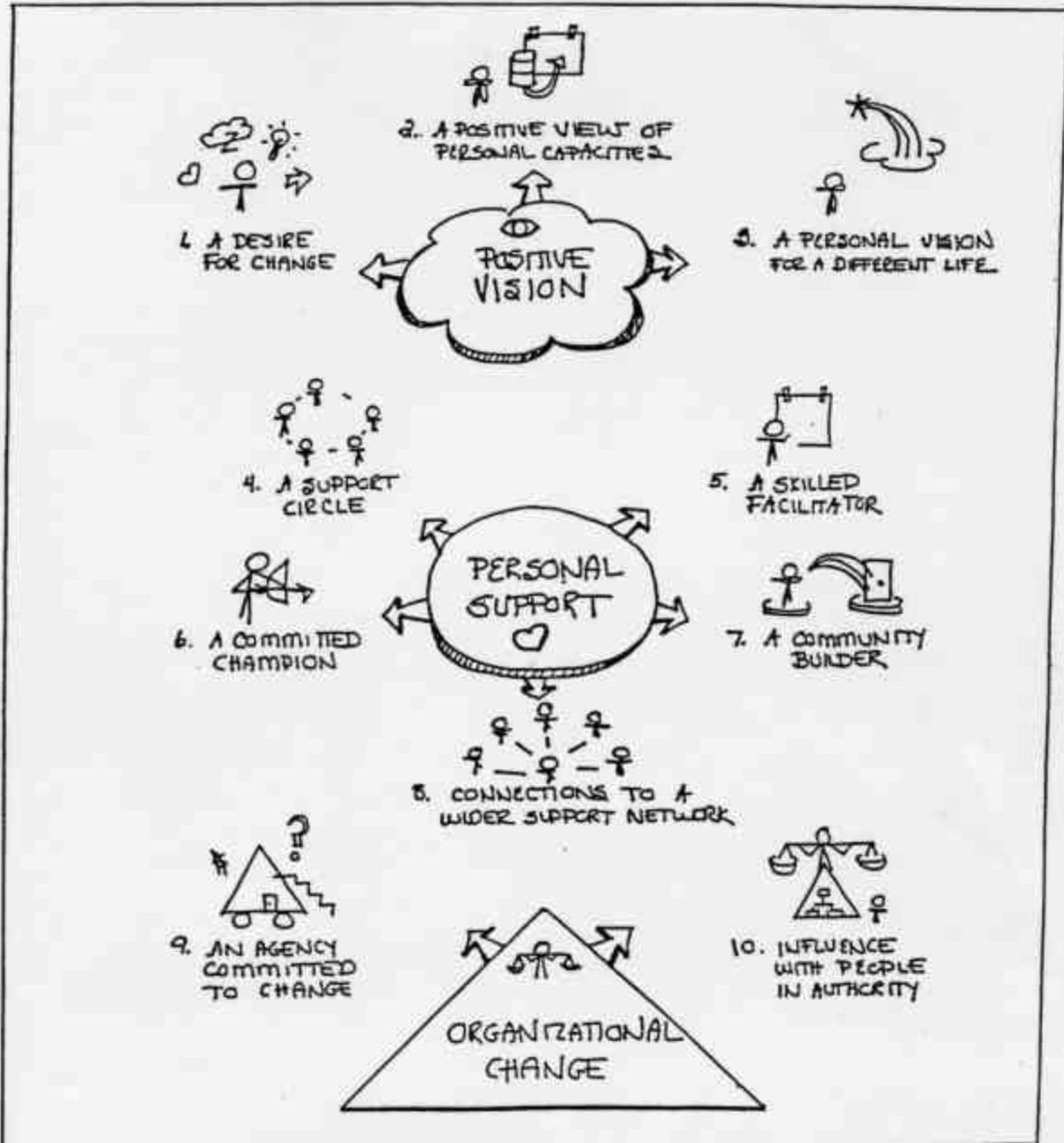
1. Positive change is more likely when the person, parents, or a committed advocate want life to be different somehow. Change is more likely when at least one person feels stuck in their current situation, when people are aware of other options, and have the energy to change things. Change is more likely when people's energy is focused by a clear set of values and assumptions.
2. Positive change is more likely when the person has the opportunity to see her/himself in light of her/his gifts and capacities. This capacity view is more likely to be maintained when a group of people develop a shared appreciation of the capacities of the person, and then work together over time to develop and support these qualities.
3. Positive change is more likely when the person has a specific personal vision for a different life. This vision is more likely to lead to change when it is sensitive to individual interests and local community life.
4. Positive change is more likely when a group of people are willing to meet on a regular basis to solve problems over time on behalf of the focus person. This support group develops a shared appreciation of the capacities and desires of the focus person and members work together to identify obstacles and solve problems.
5. Positive change is more likely when a skilled facilitator is available to support a group over time. Under ideal conditions, an effective facilitator not only supports individual circles of support, but also builds the conditions that lead to change.
6. Positive change is more likely when the support group includes at least one person with a strong commitment to act on behalf of the person. This champion(s) takes a very active role in making emergent ideas happen. Paid or unpaid, the critical characteristic of this person is a personal commitment to the quality of life of the focus person.
7. Positive change is more likely when the support network includes at least one person who builds connections and opens doors in the local community. This community builder is often deeply rooted in the local neighborhood and community and know how to create opportunities and support in the community.
8. Positive change is more likely when the person is connected to other people facing similar obstacles or challenges. This network may be formal or informal, such as a group of parents concerned about integrated education or a People First group.
9. Positive change is more likely when at least one human service agency is willing to change to support the dreams of the focus person. Organizations providing flexible, individualized supports to help people implement their personal dreams are most effective. These individualized forms of support give power directly to people and ultimately, increase the personal wealth and control available to people.
10. Positive change is more likely when the person has access to people who make major decisions about resources at the local community, regional, or state level. Influence with people in authority helps people express their issues and work constructively to find alternatives to existing limitations.

**REPRINTED WITH PERMISSION OF BETH MOUNT (1997) *PERSON-CENTERED PLANNING: FINDING DIRECTIONS FOR CHANGE USING PERSONAL FUTURES PLANNING*. NEW YORK, NEW YORK: GRAPHIC FUTURES.**

**OVERHEADS AND HANDOUTS:**

**G. OTHER INFORMATION ON PERSON-  
CENTERED PLANNING**

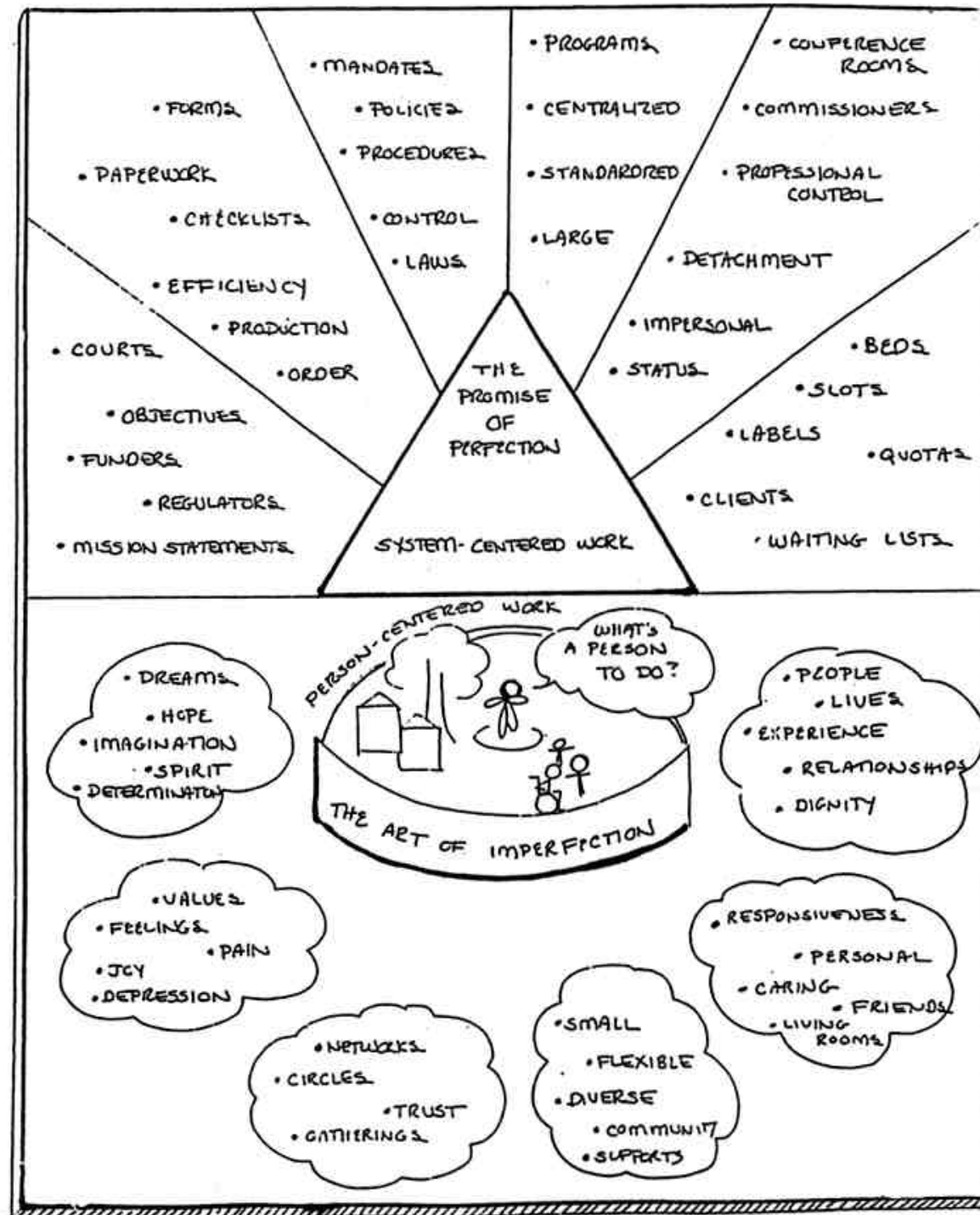
# POSITIVE CHANGE IS MORE LIKELY UNDER THESE CONDITIONS



## **Change happens for a person when...**

- At least one person takes a central role in making things happen
- A network of people share a common vision for the person & work toward it
- Network members build on existing relationships
- Family members join the effort
- At least one person has strong ties to the local community
- At least one person is skilled in assisting others to clarify vision & solve problems
- Focus is on enriching life experiences & doing things together vs. attaining objectives
- Agency leaders work for change

## CONTRASTING REALITIES: NO WONDER THERE IS TENSION!



## CREATING THE CONTEXT FOR A PLAN TO BE IMPLEMENTED

- Does the person, parents, or a committed advocate want life to be different somehow? Do people feel stuck in their current situation and do they have the energy to change things?
- Are a few people willing to meet on a regular basis to solve problems over time? Are they willing to contribute their time to the process if necessary?
- Does this planning group include at least one person who can act as a facilitator? A facilitator must take the lead in recording ideas, keeping a focus and helping others follow through on commitment. If such a person does not emerge, are you, the facilitator, able to stay in the group until internal leadership develops?
- Does the planning group include at least one person who is well connected to the local community? If not, can you find someone who can assist in building bridges to the local community?
- Is the group, focus person or family connected to other people who face similar obstacles and/or are involved in a similar process? If not, can you connect them to other groups or people as a source of renewal and support?
- Is at least one involved agency committed to organizational change as a result of what is learned from this process? Does this agency support the time and commitment required of staff? If not, can you develop an interest within an existing agency to listen to the results and implications of the planning process?
- Are resources available for the flexible, individualized supports required to implement a personal plan? If not, can you identify or create these supports within existing systems as a pilot program or by seeking local grants or other forms of assistance?

# MAPS

- What is the individual's history?
- What is your dream for the individual?
- What is your nightmare?
- Who is the individual?
- What are the individual's strengths, gifts, and abilities?
- What are the individual's needs?
- What would the individual's ideal day at school look like and what must be done to make it happen?

From McGill Action Planning System

## SAMPLE CHARTPAPER LAYOUTS: FORMAT A

HOME		
Activities Routines	Likes	Dislikes

SCHOOL		
	Likes	Dislikes
Classes		
Activities/ Clubs		

WORK			
Job Work Experience	Tasks	Likes	Dislikes

LEISURE		
Activities	Likes	Dislikes



## SAMPLE CHARTPAPER LAYOUTS: FORMAT A

(continued)

VISION FOR THE FUTURE		
	What	Standards
Home		
Work		
Education		
Leisure		

NEXT STEPS	
Home	
Work	
Education	
Leisure	

## **ESSENTIAL LIFESYLE PLANNING**

Discover core values and preferences (not superficial choices)

How a person wants to live (person by person)

Plan:

1. Positive reputation
2. Non-negotiables
3. Strong preferences
4. Highly desirables
5. To be successful in supporting (this person)
6. What does and does not make sense in the life of this person
7. What we need to do to maintain those things that make sense
8. Action plan to change those things that don't make sense

### **Ground Rules**

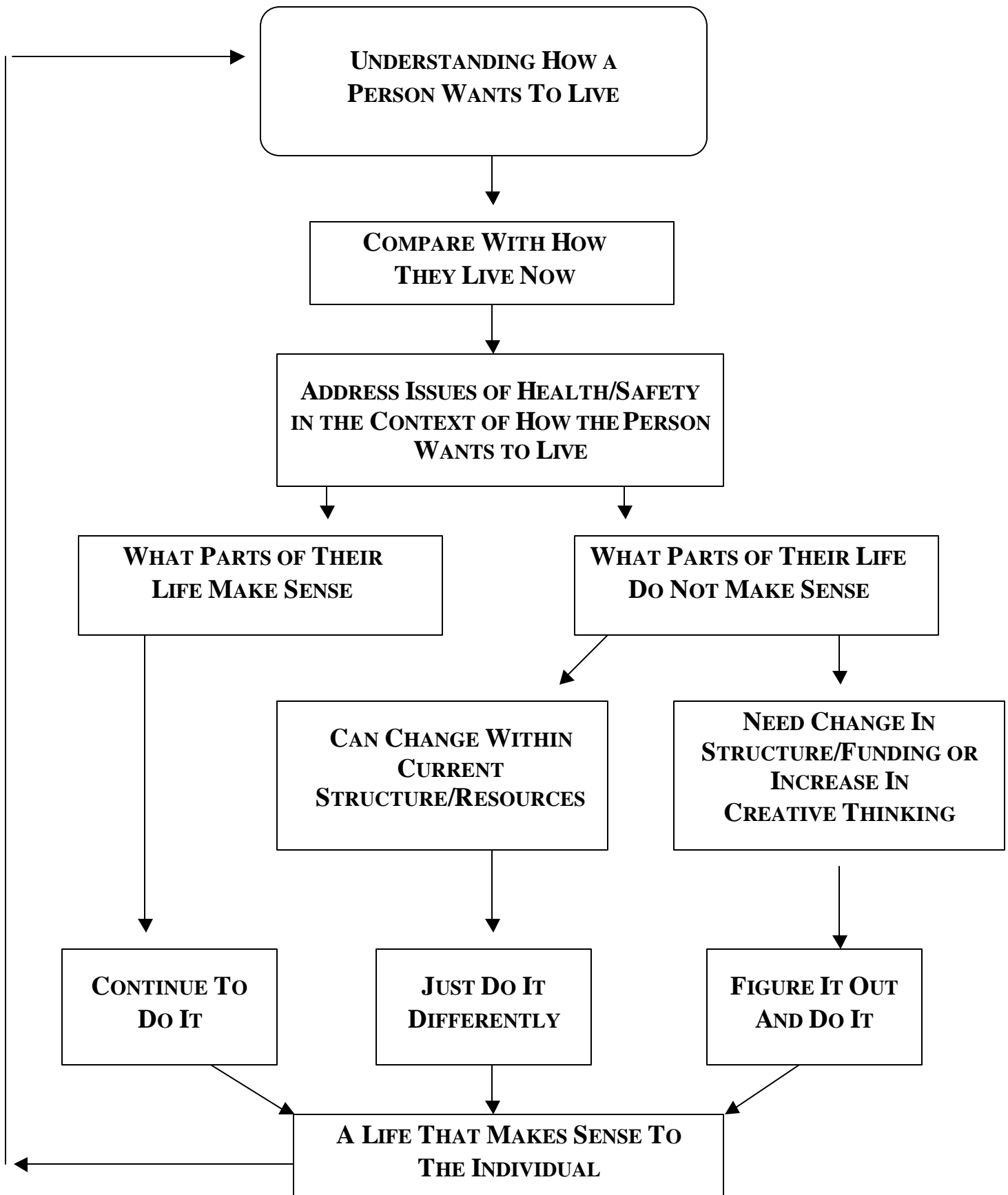
Be respectful

No jargon

No fixing

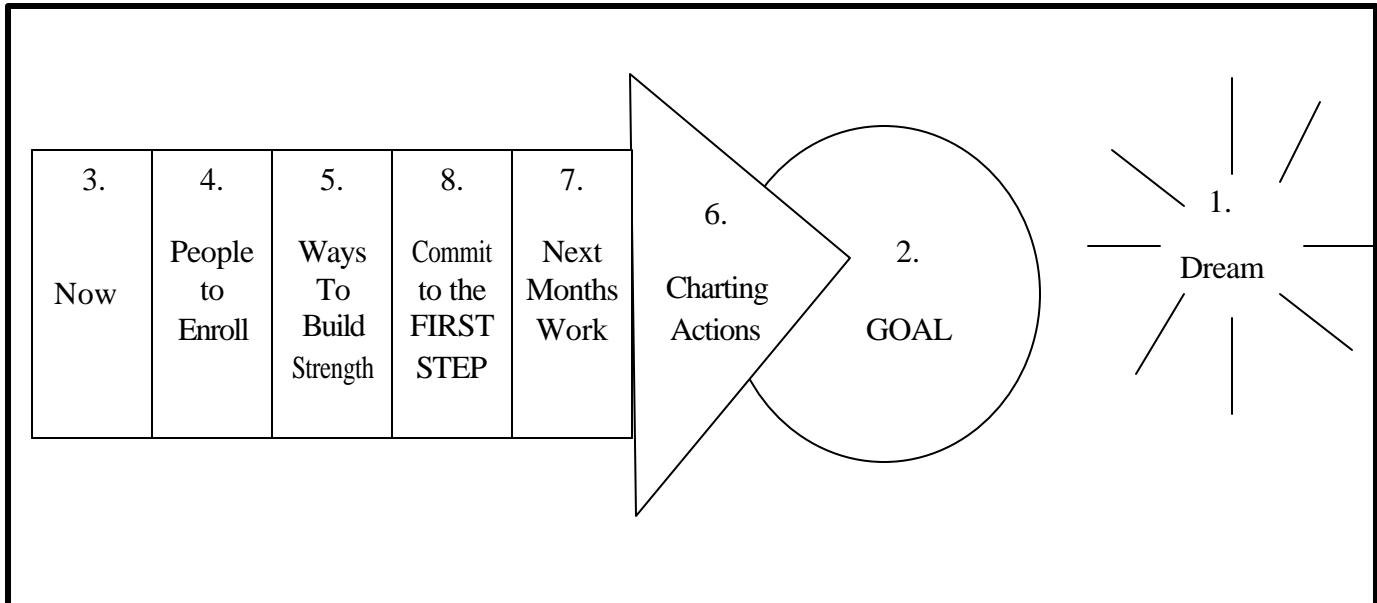
No obsessing

Have fun!



# PATH

(Planning Alternative Tomorrows with Hope)



## YOUR PATH

A Focused Planning Process

### Steps

Situate yourself in a very positive future, picture it clearly, then think Backwards.

1. Touching the Dream (the North Star).
2. Sensing the Goal: Focus for the next year.
3. Grounding in the Now: Where am I/are we?
4. Identifying People to Enroll on the Journey.
5. Recognizing Ways to Build Strength.
6. Charting Actions for the Next few Months.
7. Planning the Next Month's Work.
8. Committing to the First Step (the Next Step).

(Including a Coach to Support your First Step)



---

# A COMPARISON OF THREE TYPES OF PLANNING FOR PEOPLE WITH DISABILITIES

TRADITIONAL  
PLANNING

PERSON-CENTERED  
TEAMS

CIRCLES OF SUPPORT

---

## PURPOSE OF THE PLANNING MEETING

To coordinate services across disciplinary lines. To clarify staff roles in the implementation of training programs.

To establish a common vision for all participants. To discover information needed to focus organizational change.

To establish and support a personal vision for an individual. To build community support and action on behalf of the focus person.

---

## COMPOSITION OF THE TEAM

Professionals and specialists

Professionals, direct service workers. May include focus person and family.

Focus person and his spokesperson, family, friends, and associates. May include some human services workers.

---

## WHERE DOES THE TEAM MEET?

Human service setting conference room: centralized site.

Human Service Setting close to direct service workers: group home, workshop: decentralized site.

Community settings: living room, church room, library meeting room. Places close to where members live.

---

---

TRADITIONAL  
PLANNING

PERSON-CENTERED  
TEAMS

CIRCLES OF SUPPORT

---

### HOW OFTEN DOES THE GROUP MEET?

Once a year with quarterly reviews.

Major investment in initial sessions. Quarterly or monthly reviews.

Once a year with many sub-meetings in between for ongoing problem solving.

---

### WHO INITIATES THE MEETING FOR WHAT PURPOSE?

Team Leader initiates to meet requirements of regulations.

Organizational change agent initiates to find new directions for the organization.

Focus person or spokesperson initiates to reach goals they are unable to accomplish working alone.

---

### WHAT MOTIVATES PEOPLE TO ATTEND THE MEETING?

Avoidance of punishment by regulators. Interest in coordination of departmental units.

Interest in organizational innovation and finding new directions for focus person.

Voluntary commitment by people who are interested in helping someone they care for.

---

### NATURE OF THE IMAGES FOR THE FUTURE

Goals will fit within existing program options.

Goals will reflect new program models and options yet to be developed.

Vision will reflect desire of focus person and family.

---

### ROLES OF MEMBERS AND BOUNDARIES FOR ACTION

Members have specific roles and clear boundaries for action. Plans do not change roles or boundaries. Members act within formal existing organizational channels of authority.

Members roles will change based on new directions. Old boundaries for action may be changed to allow for new action. Plans may change roles and create new agendas for action. Members create new channels and connections to accomplish their goals.

Participant roles are constantly changing based on tasks. Boundaries for action are defined by personal vision and commitment of group members. Members use informal networks and contacts to open doors in community.

---

TRADITIONAL  
PLANNING

PERSON-CENTERED  
TEAMS

CIRCLES OF SUPPORT

---

### PRODUCT OF AN EFFECTIVE GROUP MEETING

Completed forms,  
paperwork. Specific goals  
to use to evaluate program  
effectiveness.

An agenda for  
organizational change.  
A shared understanding of  
new directions for change.

Commitments to action by  
community members.  
Significant quality of life  
changes for the focus  
person.

---

### ROLE OF HUMAN SERVICE WORKER

Set all direction. Organize  
all activity. Coordinate  
direct service worker  
activities.

Mediate interests of  
providers and focus person.  
Lead organizational change  
efforts. Listen to direct  
service workers.

Support directions defined  
by the group. Increase  
knowledge of available  
resources. Provide direct  
services to focus person.

---

### ROLE OF COMMUNITY MEMBER

Not involved in the process.

May help implement some  
ideas.

Generate and implement  
plan and action steps.

---

### ROLE OF PERSON WITH A DISABILITY

Comply with the plan.

Cooperate in the  
development of the plan.

Direct plan and activities.

---

FROM: *What are we Learning About Circles of Support* by Beth Mount, Pat Beeman, and George Ducharme. Available from Communitas, P.O. Box 374, Manchester, Connecticut 06040



# CONTEXTS AFFECTING "CHOICE"

## 1. INDIVIDUAL/PERSONAL FACTORS

- Acquiescence (people say what they think you want to hear)
- What we say is based on our past (Baskin Robbins principle)
- Complacency
- Fear of change
- We don't always say what we mean
- Trust (the Meatloaf principle)

## 2. ENVIRONMENT/SERVICES ISSUES

- Not limited to a menu of systems options
- Listening to "the unsaid"
- "It's their choice" as a justification for the status quo
- Balance the five valued experiences
- Honoring choice not as a selection of options, but understanding of the person's core values

# RESPONSES TO “I WANT....”

1. Given the person’s history, why might they be saying that?  
What would that mean about what kind of new experiences we can help them have?

*“I want to stay here...”*

2. If we listen beneath the surface, to the unsaid, what is the person saying they want?

*“I want to marry Mick Jagger”*

3. How close can we get?

*“I want to be a doctor”*

4. How can we make it happen?

*“I want my own place”*

# CHALLENGES

## Moving from

## TO

3-4 person waiver homes → Individualized support  
3-4 person enclaves

Life inside agency → Life as a community citizen

Accomplishments inside → Community empowerment services

Seeing future as available system options → Leadership and commitment to a specific direction/outcome for the people who receive services

# The Spotlight

The Newsletter of Wisconsin Council on Developmental Disabilities

Volume 2, Number 4  
Winter 1996-97

## Person Centered Planning, Should We Do It With Everyone?

By Michael W. Smull

Over the past five years person centered planning has undergone a transformation. It has gone from something mysterious that only a few dedicated and skilled people did to something where nearly everyone says, "I have been doing person centered planning for years." Person centered planning and person centered services have become trendy. It has become a litmus test for being politically correct. Any activity where people are asked what they like or want is seen as person centered. Further, states, regions, and counties are beginning to require (or to consider requiring) person centered planning for everyone receiving services or entering services.

From my travels (and from the materials that get sent to me) I have learned that many of the alleged person centered services are not person centered at all. Plans are being written where what is important to those who provide services is written as if it were important to the person receiving services, they abuse the "voice" of the person (e.g. "I must be restrained"). People whose only real dream is to get out of the institution they live in have plans that say that it is their dream to live by themselves in a house in

*"Person centered planning and person centered services have become trendy. It has become a litmus test for being politically correct."*

suburbia. People are asked questions where they do not have the life experiences necessary to give an informed answer. Questions are asked that have the answer built in. Equally troubling are the honest plans that are not implemented. Over and over again I hear of people who tell us things such as desperately wanting a new roommate who never get one. Much of what is being done represents no real change in practice. It is business as usual masquerading as being person centered.

### **Person centered planning is a means not an end**

A person centered plan is a means not an end. The life that the person wants is the outcome not the plan that describes it. Person centered planning is a process of learning how a person wants to live and then describing what needs to be done to help the person move toward that life. It is a description of where the person wants their life to go and what needs to be done (and what needs to be maintained) to get there. Good plans are rooted in what is important to the person while taking into account all of the other factors that impact on the person's life – the effects of the disability, the views of those who care about

(and know) the person, and the opportunities as well as the limitations presented by the need for public funding.

### **A person centered plan reflects a process:**

- That is respectful of the person with the disability, the family, and those who support the individual;
- Where the time and effort necessary is spent to be sure that the "voice" of the person with the disability is heard, regardless of the severity and the nature of the disability; and
- Where there is a focus on learning what is important to the person in how he or she wants to live, what is important to those who love the person, and any issues of health and safety (from the perspective of the person).  
The resulting plan is a written description of what is important to the person, how any issues of health or safety must be addressed, and what needs to happen to support the person in their desired life. The plan cannot be separated from the process. A compromised process produces a compromised plan.

Beyond these common elements there is considerable variation. Some of the better known formal processes include:

*(continued on page 3)*

personal futures planning; PATH; essential lifestyle planning; individual services design; 24 hour planning; and whole life planning. Additionally there are a host of processes that have been developed locally. These local processes are often unnamed and usually are a blend of the better known processes. However, the label of the process is not an indicator of the utility or integrity of the plan. When done well, what unites all of these efforts is a commitment to implementing what was learned. They all require partnerships between: the person; those who develop the plan; and those who implement the plan.

*“The life that the person wants is the outcome, and not the plan that describes it.”*

**What has been learned**

- Where careful planning and implementation have been done we have learned that:
- When we listen with skill and respect, we can learn what is important to each person regardless of severity of disability;
  - Growth and learning occur naturally when people have the opportunities that they want, opportunities that make sense in the context of what is important to them;
  - Providing structure inside those opportunities helps people with severe disabilities access and learn more from those opportunities;
  - Most of the behaviors that we have labeled as non-compliance, as challenging, or as problem behaviors, go away when what is important to people is present;
  - Regardless of severity of disability, people are able to take positive control over their lives as we learn to listen and trust develops; and
  - Building community, a network of self-sustaining

reciprocal relationships, occurs but it usually takes years not months.

We have also learned that while what is most important to people is modest, implementing it is affordable only if we change the way we do business. Unless we begin to fund people rather than capacity, individuals rather than houses, we cannot afford to implement plans where people are asking to change who they live with or what they do. We have learned that it is our own structures that are the barriers and that many of the reports of high costs reflect the rigidity of our responses.

**Person centered planning is also a promise**

- Shifting a system cannot be done by fiat and it cannot be done overnight. It requires the development of capacity, changing the structures that define where the system is going and what it should pay attention to, and it requires political courage and political capital. Some of the ingredients needed to change the system are:
- Training in person centered thinking for all of the people involved in planning and implementation;
  - Requiring that those who do the plans demonstrate competency in person centered planning and that some of their plans be periodically reviewed;
  - Training for those who license and inspect and requiring that they be able to determine that plans meet criteria and that the plans are being implemented;
  - Changing the rules for services and requirements for funding so that they support

*“We have learned that it is our own structures that are the barriers and that many of the reports of high costs reflect the rigidity of our responses.”*

- person centered planning and implementation;
- Support (training and technical assistance) for agencies that want to change their practices and structures;
  - Helping people with disabilities and their families build community before they are desperate, while families have the energy and resources to form a partnership; and
  - Leaders who understand what real person centered planning is, the changes needed for their implementation, and a willingness to build support while defending the changes from those who feel threatened. At its core, developing and implementing person centered plans is about shifting power and control. It is about sharing control with the people supported and their families. To many people this is an

opportunity to be embraced but to others it represents a serious loss of power. Person centered planning should be done with everyone only

where there is the willingness to make the investments and changes necessary.

However, those who lead must also sustain the change in the face of resistance and attacks. Those who wish to initiate the change need to develop the strategies necessary to sustain the change. In learning what is important to people we make an implicit promise to act on what we have learned. We should not make the promise unless we believe we can keep it.

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***Implementing Person-Centered Approaches: Now the Hard Part***  
*By PCMR Chair Valerie Bradley*

The rhetoric of “person-centered,” “family centered,” “consumer-driven” approaches to the provision of supports to people with mental retardation is rapidly replacing the language of “programs,” “slots” and “special services.” As a field, we celebrate the emerging models of self-determination and customer choice that are taking root in many parts of the country. However, the gap between our aspirations and practice is still great and it will take more than additional conversations of the uninitiated to bring current practice into line with these ideals.

*Agencies take on the difficult task of reinventing themselves in order to realize the ambitious objectives of person-centered supports.*

The notion of person centered supports is not self-implementing nor is it a concept that can be grafted onto traditional services. In a field that has undergone steady change over the past several decades, the move to models that emphasize choice and empowerment represent perhaps the most radical shift to date. Radical, because they challenge the prerogatives of professionals and providers as well as the organization of agencies and the deployment of staff. To use an overworked metaphor, crossing that bridge to the 21<sup>st</sup> Century will require a systematic commitment to organizational development and staff training that to date is not evident.

Implementation is always much less romantic than polishing and perfecting an ideal vision. To change practice on a day-by-day basis takes hard work. Any basic book on organizational behavior will affirm one basic tenet – *organizations don't like to change and will fend off change in subtle and not so subtle ways in order to maintain equilibrium and the status quo.* To change an organization requires commitment at all levels and an

unflinching and pragmatic acceptance of the inevitable dislocation and anxiety that accompanies any significant alteration in course.

The changes that are needed grow out of the distinctive character of an individualized support structure. An organizational structure geared to the management of residential arrangements like group homes and other residential programs is not suited to the oversight of supports deployed to people's homes, apartments and job sites. The former structure is hierarchical, centralized and highly differentiated, whereas the management of individualized supports requires decentralized authority, staff autonomy, and more emphasis on generic rather than specialized skills – especially for those staff performing individual support and community brokering functions.

The challenge of organizational change is complicated by additional factors such as the pressures on agencies to become more efficient in light of potential moves to managed care. Further, many agencies around the country are facing severe recruitment problems that exacerbate the problem of hiring staff capable of taking on the more autonomous role of community support worker and broker. Finally, growing waiting lists divert the time and energy of agency administrators away from needed long-term organizational planning and restructuring.

In spite, or perhaps because of, the growing constraints placed on organizations, it is imperative that agencies take on the difficult task of “reinventing” themselves in order to realize the ambitious objectives of person-centered supports. Some of the ways in which these changes can be achieved are:

- ❖ Agencies should develop collaborative relationships in order to pool scarce recruitment,

organizational development and training resources;

- ❖ The role of direct care staff needs to be redefined as more and more responsibility falls to those who provide direct support;
- ❖ Voluntary certification programs for direct support staff should be developed that provide staff with a sense of vocation and agency administrators with verification of key competencies;
- ❖ The role of centralized staff needs to be reassessed and resources need to be reallocated to those staff with the most direct responsibility for mobilizing supports;
- ❖ Organizations need to include people with disabilities and their families in the governing structure of the agency;
- ❖ Agencies must incorporate customer outcome measurements as part of their internal quality assurance and performance management system;
- ❖ Networks of mental retardation as well as other generic and human services agencies should be developed in order to maximize scarce resources and avoid duplication of efforts.

These initial suggestions are offered in recognition of the very difficult job faced by those responsible for implementing change in their own communities and agencies. They are also offered in the firm belief that the change to person centered supports is not just an enhancement to the service system but the most cost effective means to ensure the continued expansion of the benefits of support.

*PCMR Committee Chair Valerie Bradley may be reached by email at: valbrad@aol.com*

**OVERHEADS AND HANDOUTS:**

**H. CERTIFICATE OF ATTENDANCE**

# *Certificate of Attendance*

## Person Centered Planning Training

Presented to:

Date:

Time:

Presented by:

Person Centered Planning is funded in part by grant No. 41286 From the Minnesota Department of Human Services



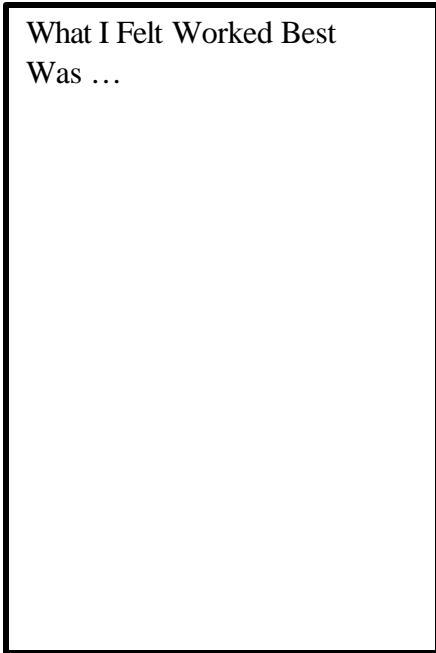
**OVERHEADS AND HANDOUTS:**

**I. SAMPLE EVALUATION FORMS**

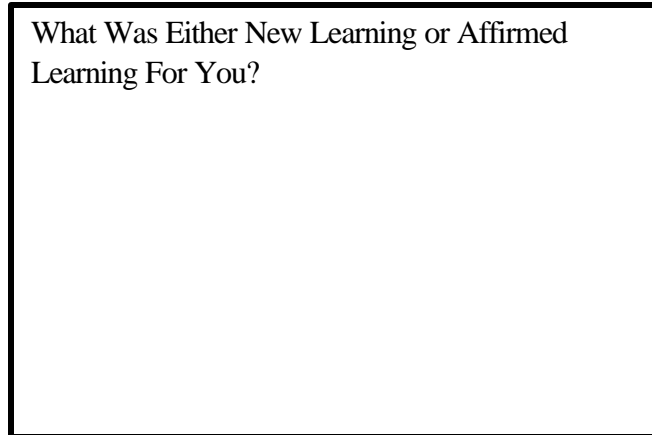
# From My Perspective...How Did The Day Shape Out?

Date \_\_\_\_\_

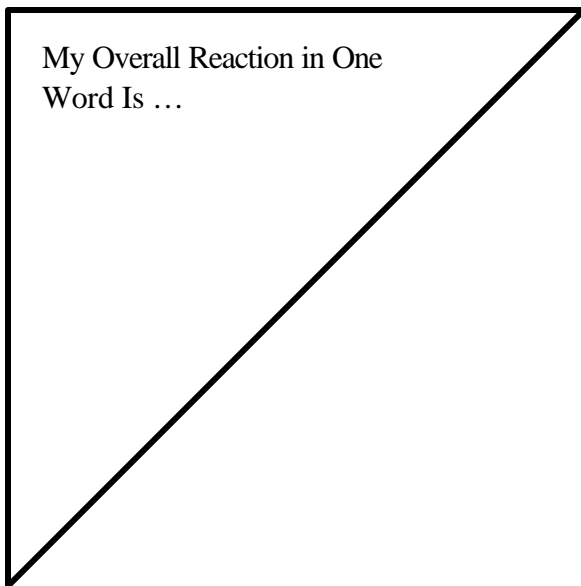
What I Felt Worked Best Was ...



What Was Either New Learning or Affirmed Learning For You?

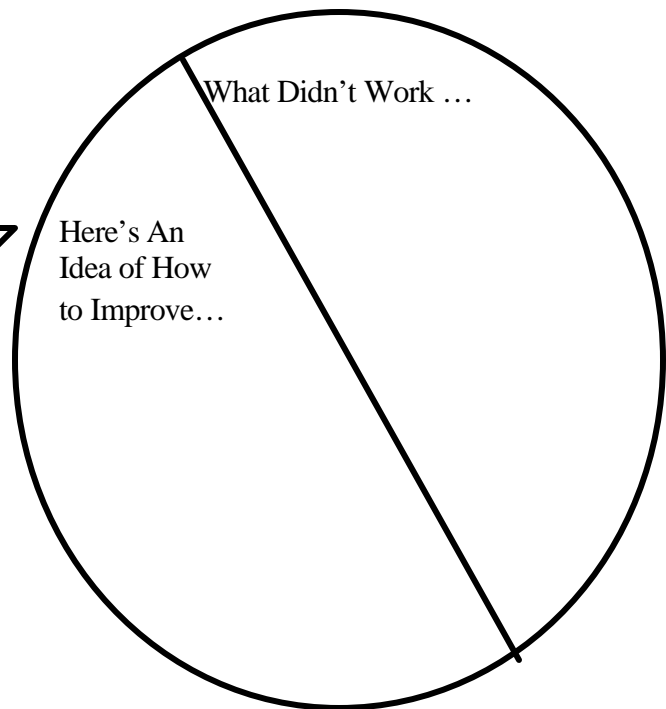


My Overall Reaction in One Word Is ...



What Didn't Work ...

Here's An Idea of How to Improve...



Name (optional) \_\_\_\_\_

# SESSION EVALUATION

Session Name and Date:
------------------------

**CONTENT:**

- New Ideas?
- Clear Understandable?
- Practical?
- Relevant?



<i>Excellent</i>					<i>Poor</i>				
5	4	3	2	1	5	4	3	2	1
5	4	3	2	1	5	4	3	2	1
5	4	3	2	1	5	4	3	2	1

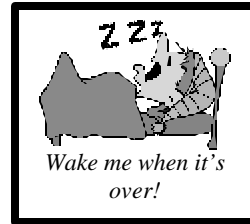


**PRESENTATION:**

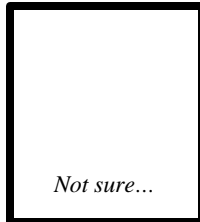
- Hold Interest?
- Encourage audience input?
- Presenter knowledgeable?
- Good audio and visibility?



<i>Excellent</i>					<i>Poor</i>				
5	4	3	2	1	5	4	3	2	1
5	4	3	2	1	5	4	3	2	1
5	4	3	2	1	5	4	3	2	1



I would recommend this speaker and topic to others (circle one).




A penny

(Give comments)



Based on today's training, what's one thing you will start doing?



# TAKING STOCK


*(not to be confused with cattle rustling)*

**ABOUT THIS COURSE....**

*Class Title:*  
*Instructor's Name:*  
*Date:*  
*Location:*


The Information Presented Was:

Clear  
 Unclear  
 So, So




**?** I'm Still Confused About:


**I LIKED:**




**I DIDN'T LIKE:**




*A Problem I Had Which Was Solved Today:*



*Thanks!!  
 I'm now able to jump into*



And Furthermore....

