

The importance of person centered thinking

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Over the past decade person centered planning has become a requirement for people receiving services for the DD system. Over that same decade those who do the planning frequently have been formally separated from those who implement the plans. This separation was done to remove a conflict of interest. When plans are done by the people who implement them there is the potential for the plan to say that what you want is what the agency is currently providing you whether or not that is true for the person. While the separation of the “planners” from the “doers” makes good public policy sense it has had some unintended negative consequences that need to be addressed.

The plan that the person centered plan replaced was typically a “compliance plan”. That is, it was written to satisfy rules and inspectors and rarely did a good job of describing what people were actually trying to do in helping someone move toward a desired life. The new requirements for person centered planning are too often operating in the same culture of needing a plan that meets the requirements rather than a plan that describes the path that someone will take over the next year. Frequently there is too little time available for those responsible for writing the plan to learn from the person and those around the person as was done when the “planners” and doers” were the same group of people.

Where the case managers funded by a waiver write the plans the demands of documentation makes the development of plans that show depth or support ongoing learning extraordinarily difficult. Even those who are gifted teachers of person centered planning report that they are unable to develop plans that go beyond minimums given the relentless demands of documentation coupled with ever present crisis. Informal discussions with case managers suggest that between one half and 3 quarters of the crisis among those that use services are the result of a bad fit between the person using services and the services that are provided. The trap that they find themselves in is one of knowing that developing and implementing good plans could prevent or resolve the crisis but they have neither the time to develop the plans nor the partnership with service providers needed for implementation. This separation of the planners from the doers and a process without adequate time or real partnership reinforces the perception that planning is a separate annual event done to maintain funding rather than a snapshot of ongoing learning that leads to a description of a desired future. In many instances the resulting plan has the form of a person centered plan without the substance.

This paper is an effort to look at one piece of the puzzle. It is not a description of a comprehensive solution but it does look at some of the steps that must be taken if the promise of self-determination is to be met. The suggestions here

arise from looking at what worked in the past and from the assumption that the best practice organizations that exist (and are being created) will always support a relatively small minority of people. This should not be interpreted as suggesting that we should stop creating best practice organizations, rather it is a recognition that we need to help existing organizations move in the direction of best practice.

When you look at the work of the agencies that were the pioneers in the development and implementation of person centered planning you discover that for many of these agencies the formal person centered planning process was in some ways a transitional activity. As these agencies started on their journeys a person centered planning process was central to their efforts. The planning process and associated activities showed them ways to see people with disabilities differently and how to base their actions on this different view. However, after years of carefully developing and acting on the plans the formal process of planning became less important. What appears to have happened is that the value- based skills that were underneath the process became part of the fabric of the agency. This way of thinking about people who use services and the associated ways of thinking about issues and problem solving were not only learned but became so routinely used that they ceased to be a conscious effort. It became part of the organizational culture, and was not an “add on” or additional program.

As this occurred, the role of the formal planning effort took on less prominence and became just one effort among many. In some agencies the annual plan became an organized way to celebrate the accomplishments and efforts of the past year as much as it was a time to figure out how to move forward. For most of those supported, moving forward in the direction that the person wanted to go was what the agency did, it did not require a meeting for it to occur. Within these agencies emphasis on the formal planning process usually meant that the person was new to the agency or that there were challenges that could be best addressed through the formal processes of planning. In this way thoughtfully and broadly engaging in person centered planning was also a way to teach person centered thinking.

Thus, for people being supported within existing agencies, what is needed is more than a few people trained in person centered planning. What is needed is the pervasive presence of person centered thinking. Each of the major formats for person centered planning is rooted in a way of thinking. It is made up of a set of value- based skills that result in the user looking at the person differently and gives the user a way of acting on what is learned. Training in each of these formats is training in a way of thinking as much as it is in a way of developing a plan. Creates a framework that tells the user what to pay attention to and what is important in what we hear. As Bolman and Deale noted –

“Frames are both windows on the world and lenses to bring the world into focus. Frames filter out some things while allowing others to pass through easily. Frames help order our experience and decide what action to take... Frames are also tools for action, and every tool has its strengths and limitations.”(Bolman and Deal, 1991)

As person centered planning has spread and become a requirement those who write the plans are often in a different organization from those who implement the plan. In separating the planners from the doers we have also separated those who can teach person centered thinking from those who do the day to day support. Person centered planning changed the culture of service planning. Person centered thinking now needs to help change the culture of organizations.

Therefore an unintended consequence of separating those who do the planning from those who provide services is to reduce the likelihood that those who provide the services will understand the underlying person centered thinking that is required for real implementation. However, the solution is not to undo the safeguard of separating those responsible for planning from those responsible for the services. We need a solution that maintains the safeguards but also does consciously what was being done unconsciously. We need the pervasive presence of person centered thinking skills and we need these skills to be exercised within a culture of partnership. While only a small percentage of people need to know how to write good person centered plans, everyone involved needs to have good skills in person centered thinking, in the value based skills that underlie the planning. At their core all of these skills are about how we can help people who traditionally have led isolated lives, lead ordinary, self-directed lives, within their own communities. The skills are about supporting people as ordinary citizens while recognizing (and accounting for) their unusual support needs.

The skills need to be used in the context of a set of interlocking partnerships - a set of partnerships between the person whose plan it is, those who care about the person, those who implement the plan, and those who write the plans. Where this happens plans will be a snapshot of ongoing learning that is being used to describe how to keep moving forward. Training in these person centered thinking skills needs to be offered to everyone and required of some. And training is not enough. Individuals who use services and their families should have opportunities to learn and use these skills. However, the skills being discussed are not only skills needed by those who do the day to day support work but also by all of those who manage and direct. These are a different skill set from those that most managers have and one of the challenges is to get senior managers to attend training in these person centered thinking skills. Current experience shows that unless senior managers fundamentally understand these skills they cannot support their implementation. They cannot create an expectation of the use of skills that they do not really understand. More

importantly, when the application of person centered thinking reveals the need for change in the structures and practices of the organization that change will not happen unless senior managers understand the need for the change.

One of the hallmarks of the pioneer agencies is the pervasive presence and use of person centered thinking in their day to day work. This requires that middle and front line managers are sufficiently proficient in the use of these skills that they serve as coaches in their use. In order for these skills to go from something learned in training to part of everyday practice their use must be modeled and reinforced. There needs to be an expectation that among the duties of front line managers is coaching those who do the day to day work into competence in person centered thinking skills. (This also suggests that front line managers get training and support in how to coach as well as in using the person centered thinking skills.)

The core person centered thinking skills are ways to listen differently and to use what you hear in different ways. One set of such skills is -

- Recognizing/learning what is important to each person as well and what as important for each person.
 - Using what is learned to create a positive dynamic balance between what is important to and what is important for each person
- In helping the person get more of what is important to them look for what they might like to learn, esp. those things that will help them move toward a better balance between what is important to them and what is important for them
- Recognizing each person's gifts and his or her current (and potential) contributions
 - Seeing where and how the gifts and contributions can be used to help the person be welcomed within their communities – seeing the opportunities
- Creating/building/strengthening relationships
 - Using the places and activities where people are welcomed as a way to begin to build relationships
- Engaging those people with relationships in supporting, safeguarding, and dreaming about a desirable future with the person

If these skills are going to be used within organizations there are a complimentary set of skills that managers must have and teach. They include -

- Having clarity about the roles and expectations of each person in a paid position. Using what Charles Handy refers to as the donut to determine for each paid position –
 - What are the things that that person must do and do as they were trained and where are people always expected to make an effort (core responsibilities)?
 - Where is it OK for that person to try things and get them wrong as well as have them work (use judgment and creativity)?

- What are the boundaries that person's responsibilities (what is not their responsibility)?
- Being able to look at and analyze situations and conditions to see what is and is not working from multiple perspectives – starting with the perspective of the person
- Encouraging and recording ongoing learning by those who do the day to day work, especially in their efforts to apply the person centered thinking skills
- How to use the skills listed to support those who are paid in similar ways –
 - Helping those who are paid know what is important to them and for them. Being able to look at and work on their own balance (while respecting their privacy)
 - Helping each person have a good match between their characteristics and gifts and who they work with and what they do
 - Learning about and supporting a positive balance for those people working together (creating and supporting person centered teams)
 - Using the same analytic technique to determine and work on what is and is not working for the teams

Methods to teach and support some of these skills have been developed by the author and his colleagues. Our efforts have demonstrated that the skills are teachable within agencies and their presence supports the development and implementation of person centered plans. More needs to be done. More ways to teach and support the skills need to be developed. More needs to be learned about what is required to have an environment that supports the ongoing use of the skills. We do know that the sequence in which these skills are first learned and then taught should vary from agency to agency. Some agencies will find that they already have strengths in some areas but not in others. Regardless of the sequence, agency managers need to be clear that a single formal class for direct support professionals and front line managers will likely do more harm than good. These are skills that must be learned, practiced, and supported. A single round of training without ongoing coaching, without understanding and support from senior management is unlikely to produce pervasive positive change. Some of the efforts will reflect partial learning, some will be stopped by managers who do not understand, and all of them will die without ongoing support. Agencies that wish to change need to have strategies for initial learning, follow along coaching, and ongoing support. Their strategies need to take into account not only the training of those who work directly with people who use services but all levels of management.

Those who fund and regulate need to not only support agency efforts to acquire and use these skills but also look at the changes and actions needed to create viable partnerships between the person, those who plan, and those who support. It is clear that we must work in partnership if we are going to have a system that supports each person and it is also clear that real partnership is often lacking. Once support for the acquisition of the skills and creating the partnerships is in

place, those who fund and regulate must create clear expectations regarding the presence of both. The efforts outlined in this paper illustrate some of what needs to happen but it is only part of the answer.