Individual Positive Behavior Support:
Preparing for First Steps

Person-Centered Planning

Minnesota Department of **Human Services**

First Steps in PBS Process

- Regular medical and mental health check-ups to ensure there isn't a health problem or medical issue developing

- Establish the team
  - Family members
  - School professionals
  - Friends and community

- Person-centered Planning

Building Effective Teams

- Teach team building skills before starting PBS process
  - Establish facilitator, time keeper, recorder
  - Agenda and meeting minutes
  - Create group vision
  - Ground rules (no interrupting, being on time)
- Continue to build team skills throughout process
- Pay attention to ratio of positive statements

Establishing the Vision & Building the Team

Person-Centered Planning

Important *TO*

What is important to a person includes those things in life which help us to be <u>satisfied</u>, <u>content</u>, <u>comforted,</u> <u>fulfilled</u>, and <u>happy</u>. It includes:

- People to be with/relationships

- Status and control

- Things to do and Places to go

- Rituals or routines

- Rhythm or pace of life

- Things to have

Important *FOR*

Issues of health

- Prevention of illness

- Treatment of illness / medical conditions

- Promotion of wellness (e.g.: diet, exercise)

 Issues of safety

- Environment

- Well being ---- physical and emotional

- Free from Fear

And...what others see as necessary to help the person be valued and be a contributing member of their community

Important To And For Are Connected

- They influence each other
- No one does anything that is "important for" them (willingly) unless a piece of it is "important" to them

Balance is dynamic (changing) and always involves tradeoffs:

- *Among the things that are "important to";*
- *Between important to and for*

Defining Characteristics of PCP

- Meetings Driven by the Person
- Important Goal: Empower Person to Lead and Make Important Decisions
- Team Members Are Chosen by the Person
- Meetings Are Tailored to the Preferences of the Person

Defining Characteristics of PCP
(Continued…)

- Build Opportunities to Experience Respect and Community Involvement

- Examples of Team Members:
    - Team members
    - Friends
    - Community members
    - Professionals in school and work settings
    - Family and peers
    - Etc.

- Self-determination and the Expression of Choice

Other Types of Person-Centered Planning

Disabilities

- Essential Lifestyle Planning
- Picture of a Life (PoL)
- PATH
- MAPS

Mental Health

- Assertive Community Treatment
- WRAP
- Wraparound Planning

Defining Characteristics of Wraparound Planning

- Individuals and Their Families Are Empowered to Lead Meetings

- Supports Identified in Meetings Are Provided in Community Settings

- Supports Are Individualized, Strength Based, and Meet the Needs of the Individual and Families

- Planning Processes Are Culturally Competent

Defining Characteristics of Wraparound Planning
(Continued…)

- Plans are Designed Within a Team-based Context and Are Coordinated Across Agencies
- Flexible Noncategorical Funding is Available
- Both Informal and Formal Supports Are Included in Plans
- Services Provided to the Individual and Family Are Unconditional in Nature
- Interagency Collaboration Occurs During Meetings and in Implementation of the Plan
- Outcomes Are Measured and Evaluated for Each Service and Intervention

Wraparound/PCP Life Domains

- **Medical/Health**
- **Recreational • Cultural**
- **Education/Vocational**
- **Legal**
- **Relationships**
- **Other**

- **Spiritual**
- **Social/Fun**
- **Safety**
- **Emotional/behavioral**
- **Basic Needs**

Wraparound: Steps Involved

- Step 1: Initial Conversation
- Step 2: Start meeting with Strengths
- Step 3: Develop a mission statement
- Step 4: Identify Needs across Domains
- Step 5: Prioritize Needs
- Step 6: Develop Actions
- Step 7: Assign Task/Solicit Commitments
- Step 8: Document Plan: Evaluate, refine,
- monitor & transition

Strengths of Wraparound Planning

- Person and Family Driven
- Focus on Improving Quality of Life
- Encourages Tailored Supports
- Focus on Systems Change
  - Systems of Care Meetings
  - Wraparound Planning
- Improves Service Coordination Across People
  - Children and Family Services
  - Mental Health
  - Education
  - Disability Services

Strengths of Person-Centered Planning

- Visual Planning Strategies Reduces Dependence on Verbal and Written Information

- Different Strategies Available

- Helps Focus the Team on the Person as the Lead During Meetings

- Provides Ways for Person to Directly Lead and Participate

Defining Characteristics of PCP (Continued…)

- Natural Supports Are Tailored (Avoiding an Over-reliance on Existing Services)

- Goals and Actions Build on the Person's Strengths (Not Their Deficits)

- Long-Term Goals & Short-term Actions Focus on Immediate Optimal Quality of Life Changes

- Develop & Maintain Significant Relationships

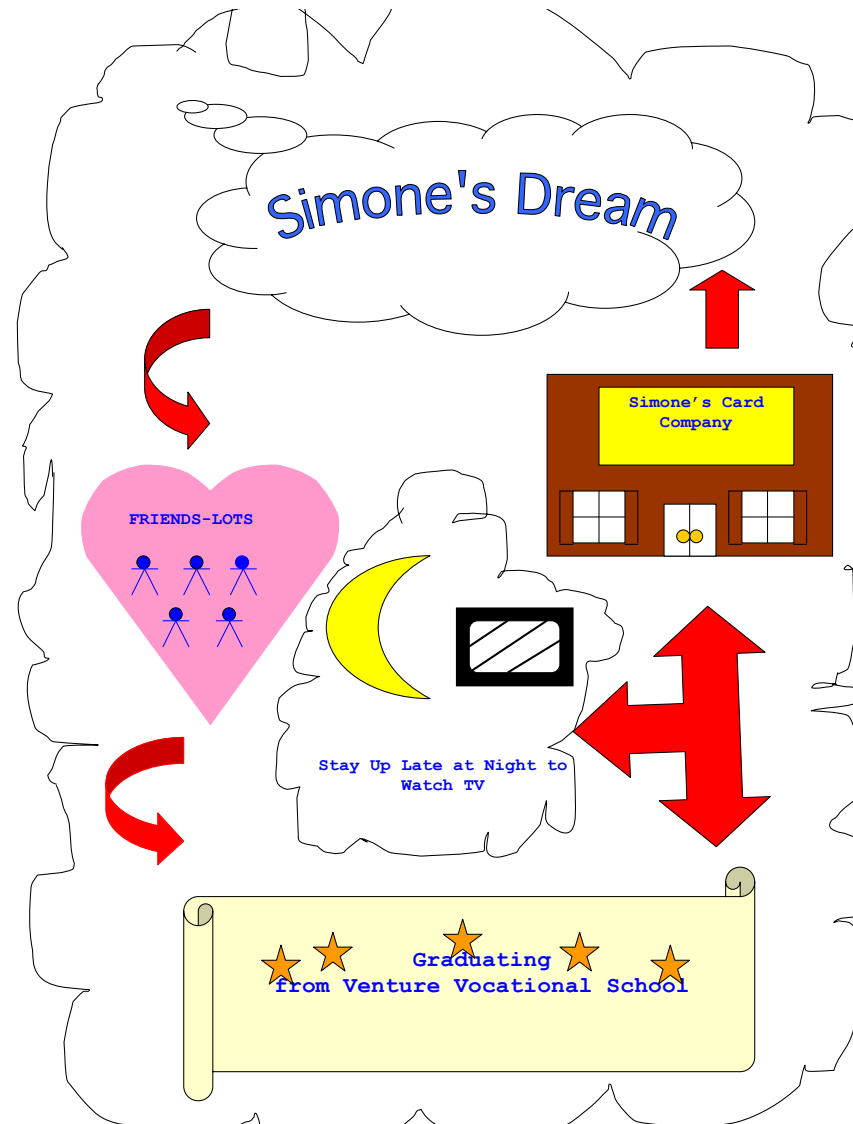# Other Types of Person-Centered Planning

Disabilities

- Essential Lifestyle Planning

- Picture of a Life (PoL)

- PATH

- MAPS

Mental Health

- Assertive Community Treatment

- Wraparound Planning

- **Essential Lifestyle Planning** (ELP): principle outcome is giving some power to the person's voice in the present, shifting from power over to power with, and bringing some order to chaos.

- **Picture of a Life**: applies person-centered thinking and planning tools that are focused on helping people envision the life they want in their community their desired future.
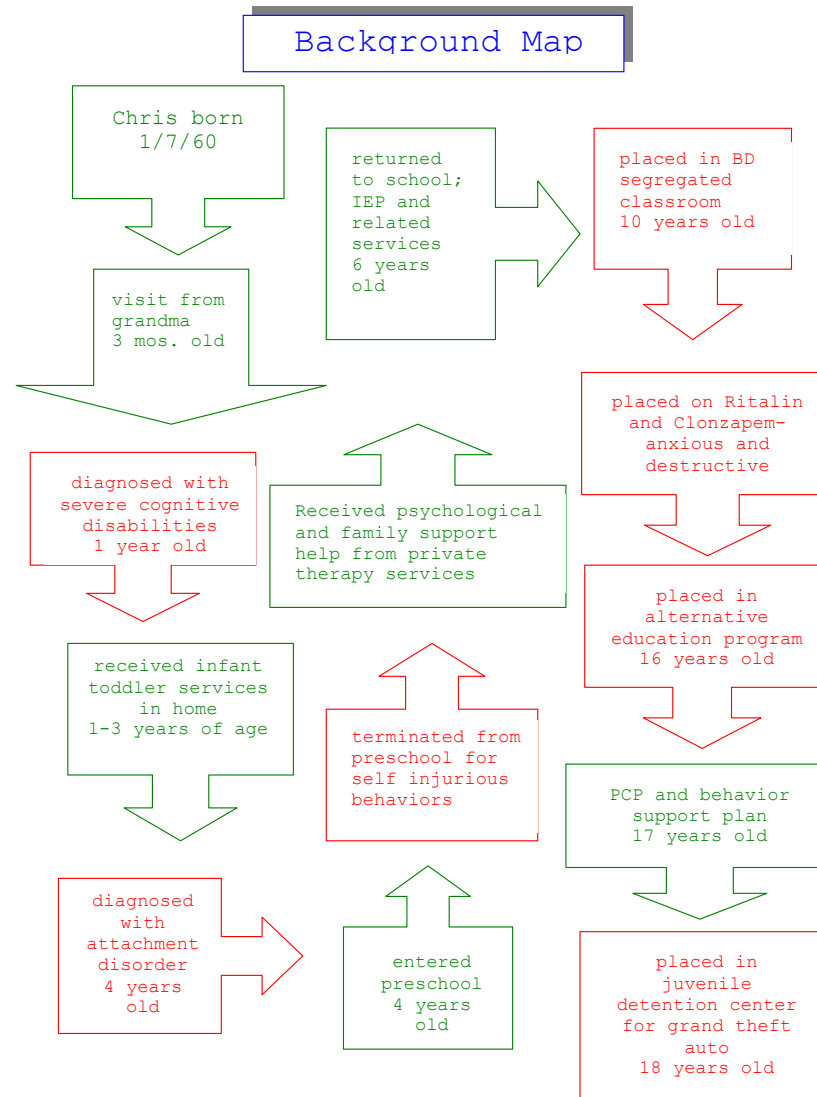
McGill Action Planning System (MAPS): principle outcome is a series of actions to get from here to there.

Planning Alternative Tomorrows with Hope (PATH): principle outcome is a series of steps to get from here to there.
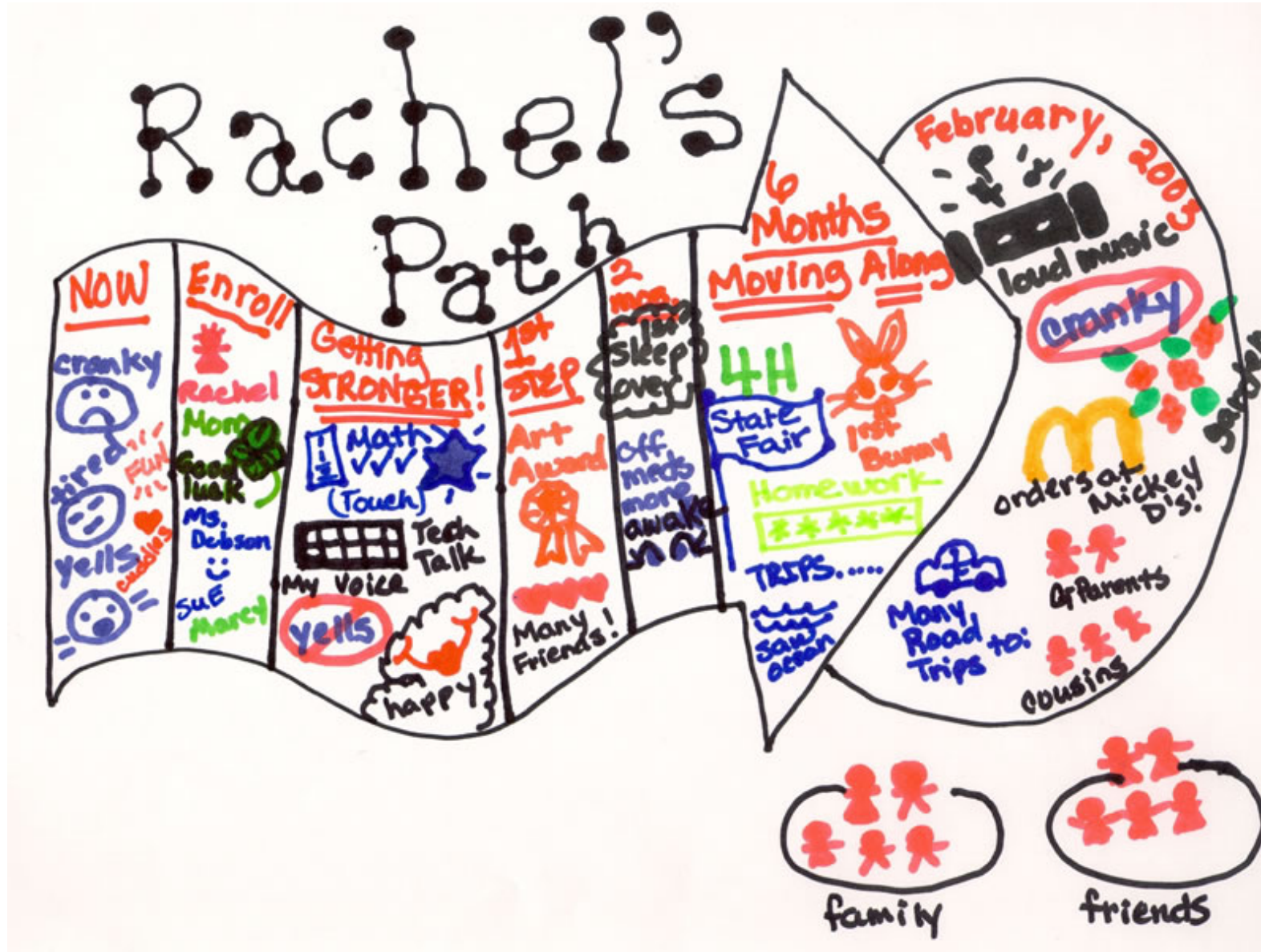
Personal Futures Planning (PFP): principle outcome is a clear, desirable future.

Key Elements of Person-Centered Planning

A Guide to Key Features of Wraparound and Person-Centered Planning

Preparing for the Pre-Meeting with Family and First Team Meeting
- Meet with the person to find out who should be invited to the first meeting
- Schedule a pre-planning/meeting with the person and if applicable his/her family in order to get their "story" and go over their strengths and needs in the five areas of safety/health, social relationships, emotional functioning, behavior, and cultural/spiritual
- Work with the person to identify the best planning strategy that will be the best fit for a person (PATH, Picture of a Life, etc.)
- Identify current team members working with the family the person thinks should be involved in the PCP
- Assess whether people from different areas of a person's life are represented (family, school, and community)
- Initiate conversations with team members separately to identify core strengths to focus on within planning
- Consider a list of questions that can guide information gathering
- Identify issues team members have and their perspectives that may lead to possible barriers to the team process
- Schedule the meeting to accommodate person's preferences (i.e. think about location, date, and time how to accommodate all team members)
- Assist the focus person, the family, and circle of support in the coordination of the meeting
- Ask team members to look through the gathering information packet ahead of time to collect thoughts; Some team members may need you to go over this with them
- Use the *MN Person-Centered Plan Report Scoring Criteria & Checklist* to ensure that you are prepared to obtain all relevant information

First Meeting Process
- Come prepared to the meeting (flip chart paper, markers, examples of evaluation tools)
- Encourage introductions and "ice breaker" activities
- Review the planning process identified and come prepared to facilitate it
- Begin with the person's strengths
- Identify where to build on strengths and discuss needs of the family (if applicable,) and focus person in terms of what they need, not services that they need
- Develop an action plan:
  - Discuss how goals will be met
  - Recruit team members to take on clearly identified tasks
  - Break down goals into action items with person responsible for assisting and dates for completion
  - Assess whether both important to and for elements are in balance
- Outline how action plan will be evaluated with people responsible for gathering and summarizing information across quality of life domains.
- Schedule time, date, and location of follow-up meetings before leaving the meeting
- Identify strategies for keeping everyone up to date on progress between meetings

Discussion and Examples

Choosing the Person-Centered Process that Works Best

Review PBS Notebook

Person-Centered Plan Report Scoring Criteria & Checklist

Adapted from the Kansas Institute for Positive Behavior Support Person-Centered Positive Behavior Support Plan (PC-PBS) Report
Scoring Criteria & Checklist (Rev. 3-5-07)

Person's Name: _____   **Rater's Name:** _____

Date of Person's Plan: _____   **Date Completed Rating:** _____

	SUMMARY OF CRITICAL FEATURES		
	Please review the entire plan and then rate the following questions by circling Y (yes) or N (no)		
CF1	Person-Centered Planning goals attempt to increase quality of life, not simply maintain it	Y	N
CF2	The plan is designed to make a meaningful positive difference in the life of the person	Y	N
CF3	The plan clearly reflects the values and beliefs (philosophy & foundation) of Person-Centered Planning	Y	N
CF4	The plan has sufficient detail to answer what is important to the person	Y	N
CF5	The plan describes what is important for the person in the context of what is important to them	Y	N
CF6	The plan addresses what needs to stay the same, to be maintained, or enhanced	Y	N
CF7	The plan addresses what needs to change	Y	N

GENERAL CRITICAL FEATURES

Total Number of Y = _____   PERCENT = [_____ / 7] X 100 = _____ %
(Total Number of Y)

Instructions - Please rate each of the following questions by circling either **0**, **1**, or **2** according to each question's criteria. Items with a * are critical elements that must be scored.

	PART 1 – DISCOVERY AND LEARNING INFORMATION			
Identifying Information				
1.*	**Identifying information is complete (facilitator name, person's name, other people involved in the planning process, DOB/age, current living environment)** 2 = All identifying information is provided including name of person writing the plan, person's name, other people involved in the planning process, DOB/age, current living environment 1 = Some of the above identifying information is included but not all 0 = With the exception of the person's name, there is no identifying information included that is relevant to the plan	2	1	0
2.*	**Planning participants, including the person, are listed and are people important to the person (including family, friends, and/or person's preferred spokesperson)** 2 = Planning participants' names and their functions/roles are listed and were chosen by the person 1 = There is a description of who participated in the planning, but it is incomplete (either not all participants are listed or their function/role is unknown, or planning participants were not chosen by the person) 0 = There is no mention about who participated in the planning	2	1	0
Information on how the person currently lives				
3.	**A brief story or history of the person's life is provided** 2 = There is a description of the person's life story or history, which includes health issues, behavioral issues, diagnoses, living situations, moves, and community involvement. If particular events do not apply, it is so stated 1 = Some events are described but the information is limited 0 = There is no information provided regarding the person's history	2	1	0

Person-Centered Planning Examples

- Britney's Story
- Jack's Story

Next Steps for Person-Centered Plan

- Do You Already Facilitate Person-Centered Plan Approaches?
- Review the Person-Centered Guide as it Applies to Person Interested in Participating in a Person-Centered Plan
- Discuss Person's:
  - Location
  - Interests
  - Strengths
- What Do You Need to Find Out to Prepare
- Document the Steps You Will Take to Prepare

Homework for Person-Centered Planning (From Notebook)

Background Reading

- Review Angela Amado's PCP Manual
- Review DHS Person-Centered Planning Protocol and Tool

Preparation

- Use "Guide to Key Features" Document to Prepare for Meeting
- Create a List of What You Need to Decide With Focus Person
    - Location
    - People Invited
    - Ways to Tailor Process
    - Meeting with Focus Person to Gather Information
    - Meetings with Invited Folks to Share How Planning Works and Gather Initial Information
- Set a Date That Works for Everyone for Planning Meeting