Welcome! My name is Dave Maloney and I am a consultant with the Office of Developmental Programs Consulting System.

This webcast was developed as a basic outcomes training. The information on person-centered thinking tools provided through this webcast will help build a foundation that will be useful to you when you learn more about outcomes. Some of the ideas we’ll discuss may be familiar to you; if they are, this will be a refresher for you. If what we discuss is new to you, then listening to the webcast will give you an introduction to some of the ideas used in outcome development.

The principles of person-centered thinking are not hard to grasp, but it’s the application of what’s learned during training that can be very challenging to us. This webcast will give you an opportunity to hear about person-centered approaches and to apply them during the webcast. At certain points, I’ll ask you to take a moment to reflect on what’s being discussed and type in your own thoughts. The information you give won’t be collected or reviewed – the activities are included only to support learning.
If you haven’t already done so, please pause the webcast and print out a copy of “Karen’s Story.” The document is located where you found the webcast. If you have never viewed an Adobe webcast before, controls to pause and play are at the bottom of the viewing pane.
During this webcast we will explore two person-centered tools in order to:

- Determine what people consider important in their lives
- Find a balance between what matters to people and what’s needed for health, safety, and welfare
- Understand the importance of obtaining different perspectives on what’s working and not working
- And practice using and seeing the connections between these person-centered techniques.

It’s important to remember that outcomes are developed within the scope of gathering information and applying it within the context of the person’s life.
Outcomes that make a difference in a person's life – that help determine what needs to change, and what needs to stay the same – are the result of learning who a person is, what matters to him or her, and what supports a person needs to live a happy, healthy and meaningful life.

The process of learning about a person’s unique capacities, gifts, needs, hopes and desires is called person-centered planning. Using a person-centered approach is a foundation for developing meaningful outcomes.
Person-Centered Planning

**From...**

**A service-centered model**

- The person conforms to the service
- “One size fits all” Approaches

**To...**

**A person-centered model**

- Plans are based on the person’s strengths, hopes, desires, and individual support needs

A service-centered model conforms to the service. Person-centered planning reframes the discussion from a service-centered model to one that’s focused on the person. Instead of developing services – and then finding people who can fit into them – person-centered planning begins with discovering what’s unique about the person, including strengths and capacities, and those things that are most important to him or her. Person-centered planning also takes into account how to best offer support based on the person’s unique needs so that he or she can live a life of choice, meaning, and purpose.
Person-centered planning is based on listening to what the person is saying through words and actions and learning from experiences to determine what works best. When we know these things, we’re able to determine the best ways to offer support. Person-centered planning focuses on developing and fostering meaningful relationships that the person chooses. When a person’s unique gifts, talents and abilities are understood and appreciated, it is more likely he or she will be seen as someone who has something valuable to contribute. Ultimately, a person-centered approach promotes a greater degree of control over decisions and direction in life.
We’ll focus on two of the many person-centered techniques that can be powerful tools to gather person-centered information and lead to discussion about meaningful outcomes. You may be familiar with these techniques because they’re used in Pennsylvania’s Individual Support Plan. However, as we discuss these tools and you have a chance to learn more about each one and try it for yourself, think about how these techniques could be used more broadly in your day-to-day life or work.

Now I’d like to introduce my colleague, Leah Napoli.
Important to items are those things that matter in our lives, like family, friends, job, or having time to yourself.

Important to items are also those things that people say they cannot --- or choose not --- to live without. As well as, things which, when present, are likely to contribute to a good day, or when absent, are likely to contribute to a bad day. For example, spending time with people we choose, doing things we enjoy, and rhythm or pace of life are important to us and can contribute to having a good or bad day.
For most of us what’s important for us typically involves our overall health and safety.

Issues related to health involve the prevention or treatment of illness or medical conditions; and/or promotion of wellness, such as: diet, exercise, and not engaging in risky habits.

Issues related to safety involve the person’s environment; physical and emotional well being; and freedom from fear. It is an essential human need to feel safe and secure in our own surroundings.

Typically, those items that are important for us, are usually those things that we ourselves may not always like to do, or enjoy. For example, it may be important for someone to watch his or her cholesterol, however to the person this isn’t such a great thing because he or she enjoys eating potato chips.
What is important to a person includes what he or she is conveying through words and actions, other people may have their own opinions, but it’s all about what the person truly feels is important to him or her.

Keep in mind, in a given situation where what people say is different from what they are doing or showing, the bias is to rely on their behavior or body language as their true feelings or expression. For example, you ask your friend, “How are you?” His response is with his arms folded in front of him, and saying in a sad tone, “I’m fine.” Now, would you believe his words or his tone, actions or body language?

Now let’s talk about Important For.
Another important area that may sometimes be overlooked in a person’s life is what others see as necessary to help the person know that he or she is being valued and a contributing member of the community. Supporting the person, helping her or him “fit-in” and have that sense of belonging is important for the person.

Support teams may have an easier time identifying what is important for a person based on things like prevention of illness, and/or health promotion. However, teams also want to consider what is important for a person beyond obvious risks to health and safety and how to offer support. Here’s an example that teams may want to consider when offering support:

- A person who tends to self-isolate his/herself, help plan regular contact with family, friends and neighbors.

Teams may agree that issues like these are important for a person, but must recognize that the person may not see the issues the same way. Therefore, teams must plan the most respectful way to approach these sensitive and highly personal issues - perhaps privately, outside of team meetings – and consider factors such as the person’s motives and history.
Let’s start by meeting Karen Monroe.

Karen is a fictitious person based on real experiences with people we support. Now we’re going to hear Karen’s story – as you listen, please have Karen’s story available – it’s a separate handout posted where you accessed this webinar. Through the remainder of this webcast, you will have the opportunity to practice and apply the two person-centered tools to Karen’s current life situation.

Karen Monroe lives at home with her dad and her grandma in a suburb in eastern Pennsylvania. Karen’s faith is very important to her. She sings in the choir at her place of worship, and helps to distribute the bulletins at the worship service. Karen’s family and friends are also very important to her. She helps plan the annual block party in her neighborhood and often babysits for her next door neighbor, Maria. Karen is 52 years old and works part-time at Home Supplies, a local home improvement store, in the lawn and garden center. She has worked happily at Home Supplies for 10 years.

Karen takes pride in taking care of her family home. She is the primary person who cooks, cleans, and does laundry for her family. Her family depends on Karen to take care of the home because her caregivers are unable to do these chores. Karen’s dad has a disability due to a past work injury and her grandmother is 92 years old and uses a walker.
Recently, Karen’s dad has been noticing that she has been doing things that are out of character for her. He has been noticing that Karen is not as motivated to go to work. She has been short-tempered around the neighbors’ kids and less tolerant of their playfulness. Also, Karen has been forgetting to wash her hair. When doing the dishes, she’s been throwing out plates and utensils. She’s forgetting to turn off the stove and leaving the refrigerator door open.

Because of these changes that her dad has been noticing, he has set up an appointment with her doctor to determine if there may be a medical reason for these sudden changes. At her appointment with Dr. Brown, he diagnosed Karen with early onset dementia. Karen is now on a new medication called Aricept® which she takes 5mg daily at bedtime.

With her dad’s support, Karen had also met with her boss at Home Supplies who has given her a modified and reduced morning work schedule.
Karen’s dad has also met with their neighbor, Maria. Karen has been babysitting Maria’s two children – Lola and Roberto - for almost six years. Maria and Mr. Monroe have decided that for now, Karen will not be alone with the children. Karen will still be able to see Lola and Roberto when Maria is home.
Now that Karen is home during the day, her dad is concerned about her safety, even though her grandma is home with her. Grandma is unable to care for Karen due to her recent health changes. Karen’s dad has asked that his cousin, Tom Monroe, help out. Twice a week, Tom will check in on Karen and grandma in the afternoon. Sometimes they will go grocery shopping together or Tom will take the ladies out to lunch.
After reading Karen’s story, think about what areas or items in Karen’s life that are Important To her. Remember, Important To items are things that matter in our lives, we cannot/choose not to live without, and contribute to a good day, or when absent contribute to a bad day.

By clicking on the text box at the bottom of this slide, begin typing in your list of items that are Important To Karen.

This is not a test. Responses will not be graded and will not be used to determine whether or not you have successfully completed this online activity.

When you’re finished, click next to move to the next slide and view our suggestions.
Is your list similar to what’s on the slide? Take a moment to review the contents. Look at your list again, anything on there that should be on Karen’s Important For?

From the information provided in Karen’s story, she lives an active life. She values her family, neighbors, job and community.
Now, referring back to Karen’s story think about what areas or items in Karen’s life that are Important For her. Remember that Important For items relate to health, safety, sense of feeling valued as a contributing member to one’s community and emotional well-being.

Again, by clicking on the text box at the bottom of this slide, begin typing in your list of items that are Important For Karen.

When you’re finished, click next to move to the next slide and view our suggestions.
Take a moment and review the contents on the slide. How does your list compare with what’s on the slide?

For Karen, right now her life has been altered due to her recent medical diagnosis, and therefore Karen’s important for list reflects these changes.

The things on Karen’s Important for list are likely things that her dad and grandma would say.
Due to Karen’s recent medical diagnosis, we can assume that she may feel out of balance since her life and priorities have changed.

As we have discussed, things that are Important For us are generally focused on health and safety and may be things that we may not really want to do, can make us scared, raise anxiety and/or concern. When we explore Important To items in connection with Important For items we can identify the things that help us to tolerate some of what we need to do because it is Important For us. By addressing the Important To we greatly increase the possibility of turning a very bad day, or moment into one that is bearable, okay or even good.

So, if we were Karen’s support team, how would we begin to help her gain a sense of balance back in her life?

As an example, looking at the one of Karen’s Important For items – Scheduling routine doctor’s appointments to monitor her diagnosis is probably not one of Karen’s favorite things to do. So, in order to help Karen perhaps feel a little bit better about going to see her doctor on a more routine basis if we look at her Important To list and we see – *Singing in the choir*, perhaps scheduling her doctor’s appointments the same day and before choir, she would then have something to look forward after her medical visit.

Again, the idea here is to somehow make those things that aren’t particularly enjoyable to do, a little more tolerable.

Also as we make a connection between the Important To/Important For items for Karen, you may have had additional questions about Karen’s current situation, or there may be some areas in her life that still need to be figured out. For example:

- Is there a family history of dementia? How fast did it progress?
- What about side-effects to the Aricept® medication?

When given information about people we support and discovering items that are Important To them, we may find that we don’t have all of the answers, and that’s perfectly okay. There are still areas in the person’s life that we continue to figure out and need to ask questions in order to help him or her move forward.
Balancing Important To and Important For is not easy. Teams may struggle with this balance of Important To and Important For and that’s okay. We can recognize in our own lives that balance is never perfect and it’s ever shifting. What fits today, may not fit tomorrow. When our lives feel out of balance we look to see what we can change to get a better balance.

It is even more challenging when we are describing what balance looks like for other people, and acknowledging that it changes for them too, especially when their Important To’s and Important For’s are in conflict with each other.

When supporting people to find their balance between Important To and Important For, we want to try to help them find their best fit. On our part, this involves respectful guessing when introducing new ideas, or when trying a different approach to help the person achieve his or hers overall desire. Respectful guessing is particularly important and helpful when working with people who do not use words to communicate.
What Makes Sense/What Doesn’t Make Sense is a tool that focuses on life at the present moment. It helps people think about what’s happening right now, not the future and not the past. The key word here is currently – what’s currently happening in the person’s life. We’re not looking for what “would” work or what “could” work or what worked in the past. Another way to think about this tool is to ask the questions “what’s working right now” and “what’s not working right now”.

We’re not looking for opposites when we identify What Makes Sense and What Doesn’t Make Sense. For example, Sam enjoys going to McDonald’s every morning on his way to work for coffee and says that this is working in his life. For Sam, going to McDonald’s every day makes sense. We wouldn’t simply list the opposite of not going to McDonald’s every morning for coffee as something that doesn’t make sense, because this isn’t what’s happening in Sam’s life; Sam is going to McDonald’s every day. Therefore, we would include going to McDonald’s in what makes sense for Sam, but not list the opposite in what doesn’t make sense.

• Focuses on what’s happening right now
  ▪ Not the future or the past
  ▪ Not what would work
  ▪ Not what could work
  ▪ Not what used to work
• Not opposites
This tool works best when it’s focused on just one part of a person’s life. When you try and cover the entire spectrum of someone’s life, it gets too big and ends up looking like a summary of the plan.

To determine where to focus, think about what the plan sets out to accomplish. The individual’s team could focus on a block of time – for example, look at what is working and not working in the morning or on weekends. You could look at a part of someone’s life, for example what’s working and not working where someone lives. Another way to use this tool is to think about an event, like what does and does not work when the individual goes to her brother’s home for a visit with family.

This particular tool also helps determine what needs to stay the same, be enhanced, or what needs to change in the person’s current life. Therefore, it lends itself to outcome development.
What Makes Sense/Doesn’t Make Sense looks at a snapshot in time from multiple perspectives. It shows common ground and highlights areas where people may feel differently about a situation. This tool can be useful when small, but important, areas of disagreement are not resolved and when people who should be working together see only the other’s lack of understanding and don’t appreciate other points of view.

What Makes Sense/What Doesn’t Make Sense can help prevent us from inadvertently changing aspects of a person’s life that are working and are important. It can help us understand the things that are working about a given situation before we begin to make changes to it.
Let’s think again about Karen again.

What makes sense for Karen? To think about this another way, what’s currently working in her life?

From Karen’s perspective, one example might be her faith. We know from the information we heard earlier that her faith is very important to her. We could say that, for Karen, attending church is making sense in her life.
What are other things that you think make sense to Karen about her life right now, from her perspective?

Take a couple of minutes and type your thoughts in the box provided on the screen. Based on what you know about Karen, what do you think she might say is working well in her life right now?
Now we’re going to think about what’s working for Karen from the perspectives of the people in her life.
What do you think Karen’s dad and grandmother would say is working right now in Karen’s life?

Take a couple of minutes and type your ideas in the box provided on the screen. Based on what you know about Karen’s dad and grandmother, what do you think they might say is working well in Karen’s life right now?
What about Maria, Karen’s neighbor and friend. What do you think Maria would say is working right now in Karen’s life?

Again, type your thoughts in the box provided on the screen. Based on what you know about Maria, what do you think she might say is working well in Karen’s life right now?
Now, we’re going to focus on What Doesn’t Make Sense. Remember, we’re not looking for opposites. What we don’t want to do is just put the opposite of everything that Does Make Sense in the What Doesn’t Make Sense column. We’re looking for what’s not working in the person’s life right now. We’re not looking for things that didn’t work in the past or things that might not work in the future, only what doesn’t make sense right now.
Lets use this part of the tool for Karen. What doesn’t make sense for her? To say it another way, what’s currently not working in Karen’s life – from her perspective?

One example might be her lack of time with Lola and Roberto. We know from the information we heard earlier that she’s not able to babysit without someone being with her. From Karen’s perspective, spending less time with the children would be something that she would say is not working in her life.
What else do you think doesn’t make sense to Karen about her life right now?

Take a couple of minutes and jot down your thoughts in the box on the screen. Based on what you know about Karen, what do you think she might say is not working well in her life right now?
Let’s think about what doesn’t make sense from the perspective of Karen’s father. What do you think he would say is not working right now in Karen’s life?

Take a couple of minutes and jot down your thoughts in the box provided on the screen. Based on what you know about Karen’s dad, what do you think he would say doesn’t make sense in Karen’s life right now?
What about Maria? What would she say doesn’t make sense in Karen’s life right now?

Again, type your ideas in the box provided on the screen. Based on what you know about Maria, what do you think she might say is not working well in Karen’s life right now?
Now that you’ve shared your thoughts, here are some of ours. You’ll see on the slide that there are many things in Karen’s life right now that are making sense, and there are also some things that don’t make sense. Take a few minutes to take a look at each of the team member’s perspectives – pause the recording if you need to.

If the What Makes Sense/What Doesn’t Make Sense tool has enough detail and if each person’s perspective is included, it helps people gain perspective - to pause, step back and really see what’s working and not working right now.

It also can help people get unstuck because it contains two of the core principles of negotiation:
• When you get each person’s perspective on paper they feel listened to; and
• When you really examine situations in enough detail you can find areas of agreement.

Using this tool helps the team see where they agree – their “common ground” – and it helps bring out areas of disagreement that can be discussed.
When using these two person-centered techniques, it’s important to look at all the information and how it fits together. From what we’ve learned from Karen’s example, we’re now able to draw a connection between the concepts we’ve reviewed.

One of the things on Karen’s Important To list is “taking care of the family home.” For Karen, one way to express that is cooking and cleaning, one of the things that makes sense from her perspective. However, on the Important For list, people are concerned that “someone is with her when using the stove.” This is an expression of people’s concern for Karen’s safety. But from Karen’s perspective, “not being able to cook and clean like I used to,” does NOT make sense.

Looking at the information that these tools have gathered about what’s currently happening in Karen’s life, it’s apparent that there are things that used to be part of Karen’s life that are in jeopardy. The next step for Karen, her family, and those that support them is to begin planning action that will help Karen keep the things that are important in her life, while addressing concerns about doing them safely.

However, knowing these things is not enough, Karen’s team could plan for a way for Karen to cook meals for her family while being safe in the kitchen.
Learning what is present and not present in people’s lives can lead teams to action.

The information gathered by using Important To/Important For and What Makes Sense/What Doesn’t Make Sense can help teams determine where to take action.

Questions teams can ask include:
What is on the Important To list that is not being addressed? How can we help the person get to Important To?

Using these tools is a great way to assist the team in brainstorming about ways to better support the person and help him or her live a more person centered life.
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