Person Centered Planning: Setting the Stage for Success

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Today

• Iowa Code and what is expected of providers
• Thinking and planning for the future
  • System Centered and Person Centered
• Qualities of a good facilitator
• Pre-Work
• Characteristics of Effective Teams
• The Meeting
• Evaluating the process
78.27(4) Comprehensive service plan. Individualized, planned, and appropriate services shall be guided by a member-specific comprehensive service plan or treatment plan developed with the member in collaboration with an interdisciplinary team, as appropriate. Medically necessary services shall be planned for and provided at the locations where the member lives, learns, works, and socializes.
CONDITIONS OF PARTICIPATION FOR PROVIDERS OF MEDICAL AND REMEDIAL CARE

• 77.25(5) Residential and nonresidential settings. Effective March 17, 2022, all home- and community-based services (HCBS), whether residential or nonresidential, shall be provided in integrated, community-based settings that support full access of individuals receiving Medicaid HCBS to the greater community, including opportunities to seek employment and work in competitive integrated settings, engage in community life, control personal resources, and receive services in the community, to the same degree of access as individuals not receiving Medicaid HCBS. Settings shall optimize individual initiative, autonomy, and independence in making life choices, including but not limited to daily activities, physical environment, and with whom to interact.
### Requirement C. Person Centered Planning

*At a minimum, there will be evidence of:*

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Evidence</th>
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<tbody>
<tr>
<td>1. Provider participation in interdisciplinary team meetings</td>
<td>Yes</td>
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<td>2. The member’s file contains a copy of the written person centered plan</td>
<td>Yes</td>
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<td>3. The provider’s plan is consistent with the case manager’s person centered plan</td>
<td>Yes</td>
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<td>4. The provider’s service plan includes interventions and supports needed to meet member goals with incremental action steps, as appropriate</td>
<td>Yes</td>
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<td>5. The provider’s plan reflects desired member outcomes</td>
<td>Yes</td>
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<td>6. The provider’s service plan includes documentation of all rights restrictions, the need for the restriction and a plan to restore those rights or a reason why a plan is not necessary or appropriate</td>
<td>Yes</td>
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If indicating “No,” describe plan to meet the standard(s):

If indicating “NA,” describe why the standard(s) are not applicable to your agency:
Shifting to a new way to support and help

Person Centered

System Centered

- Plan a life of programs
- Limited options, typically segregated
- Over emphasis on clinical strategies
- Organized to fit into constraints of funders, regulators, policies and rules

- Crafts and desirable lifestyle
- Designs unlimited desirable experiences
- Finds new possibilities
- Focus on quality of life
- Emphasizes dreams, desires and meaningful experience
- Organized to respond to people
Qualities of a good facilitator

• Believes in Person-Centered Planning process and philosophy
• Is committed to process and to advocating for the focus person
• Understands and can logistically implement the process
  • Supporting the focus person
  • Managing group members
  • Group facilitation skills
Qualities of a good facilitator (cont.)

• Key qualities
  • Non-Judgmental
  • A good listener
  • Self-Confident
  • Flexible
  • Genuine
  • Hospitable
  • Positive
  • Reinforcing
  • Strengths based
Pre-Work

- Designating a facilitator or person coordinating the meeting
  - Meeting with individual to discuss
    - Who will be at the meeting
    - What time frame works best for the meeting
    - What environment will be comfortable for the meeting
    - Plan agenda or get items of interest from the focus person
    - Is the focus person comfortable?
    - What fears or apprehension might they have and how can those be managed?
    - What would help make the environment and meeting more welcoming for the focus person?
Pre-Work

• Designating a facilitator or person coordinating the meeting
  • Meeting with individual to discuss (continued)
    • What are the ground rules for the meeting?
    • Are there topics or phrases or words the focus person wants to avoid?
    • Do we need breaks?
    • Who gets copies of the agenda or any other relevant paperwork?
Characteristics of Effective Teams

- Mutually set goals
- Clearly defined roles
- Creative
- Fact based decision making
- Task Oriented
- Inclusive
- Listening

- Problem Solving
- Seeking feedback
- Open communication
- Open expression of ideas
- Cooperative
- Focus on finding solutions
The meeting

• Visually develop the following:
  • Overall Vision
  • Strategies
  • Opportunities
  • Obstacles
  • Supports needed
  • Priorities and Commitment going forward

• Use visuals with flip charts, white boards, etc. to ensure items are addressed and seen by all team members
Evaluating the quality of Person-Centered Planning

• Philosophy, Assumptions and Beliefs
• Process
• Content
• Follow-Along, Implementation and Revision
Thank you.