

# BUILDING CAPACITY FOR PERSON CENTERED THINKING

IN SUPPORT OF PEOPLE WITH DEVELOPMENTAL DISABILITIES



# Acknowledgments

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Channel Islands Social Services (CISS)  
Eastern Los Angeles Regional Center (ELARC)  
Genesis Developmental Services (GDS)  
PathPoint  
People Creating Success, Inc. (PCS)  
Tri-Counties Regional Center (TCRC)

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“Not only do the TCRC staff interviewed acknowledge the positive changes resulting from PCT initiative and practices at the organizational level, they also believe that PCT practices have made changes on a personal level, affecting positively both their professional and personal lives.”

~MIAN WANG, PHD, PROFESSOR OF SPECIAL EDUCATION, UNIVERSITY OF CALIFORNIA, SANTA BARBARA

As social services and healthcare systems evolve, organizations continue to seek an optimal model for delivery of supports and services. Regional centers and their partner agencies that provide services specifically to individuals with developmental disabilities are no strangers to this pursuit. Various approaches have been used since inception of the regional center system in California - - a grass roots effort by parents and other concerned stakeholders to protect basic rights and strive for quality of lives for persons with developmental disabilities.

Originally, a medical model for the delivery of services to persons with developmental disabilities was proven effective for some assurances of safety and the delivery of certain types of redundant care. Soon it became clear that there was more work to do to support people to have an authentic life beyond consideration of health and safety issues that is the basis of the medical model. Individuals with complex needs were seeking more than daily physical support and parents of children with emerging disabilities were striving and hoping for ways to create the best developmental path for their children. The voice of the person served needed to be heard and the standard reporting and observing of behaviors and needs did not provide adequate opportunity for the person to make choices or be involved in decisions affecting his or her life.

The person centered approach provides not only a model but a paradigm that

benefits the person receiving services as well as the employees and leadership of the organization. As employees are supported with tools to gather meaningful information, make informed decisions and help people receiving services plan their life, a central purpose and theme emerges.

We can create a significant difference in the lives of persons receiving services and supports with the infrastructure developed through the use of the tools in this practice. We use the information and decision making processes and rely on a set of principles that guide us to plan with people, to develop and maintain a positive working environment culture, and ultimately to influence those who are in a position to help sustain our system in California.

Enjoy this publication and benefit from the information to launch your organization on a journey of pursuing the best lives for persons with developmental disabilities through the use of person centered practices. I am pleased that the work of the Person Centered Thinking Training Collaborative has resulted in this collection of experiences and insights.



Omar Noorzad, PhD  
Executive Director  
Tri-Counties Regional Center

“Person Centered Thinking is transforming whole systems of care and organizations that serve people with developmental disabilities. We are committed to doing more than just consistently and successfully meeting basic assurances- the clear, nonnegotiable requirements that keep people safe, healthy, and protect their basic rights. We need to also have the skills, actions, and practices that will support the vision of the future for each person that we serve. Person Centered Thinking is essential to achieving these outcomes.”

~OMAR NOORZAD, PH.D., EXECUTIVE DIRECTOR, TRI-COUNTIES REGIONAL CENTER

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Tri-Counties Regional Center (TCRC) together with Eastern Los Angeles Regional Center, Genesis Developmental Services, People Creating Success, PathPoint and Channel Islands Social Services formed a Person Centered Thinking Training Collaborative in 2007 to build capacity for implementing Person Centered Thinking practices across participating organizations and throughout Ventura, Santa Barbara and San Luis Obispo Counties. The Person Centered Thinking training initiative was one of sixteen projects, funded by the Weingart Foundation Developmental Disabilities Initiative, with the shared goal of strengthening internal organizational capacities in order to sustain existing services, while enabling new program growth and development.

The Person Centered Thinking Training Collaborative set out to utilize Person Centered Thinking (PCT) tools and practices to influence individual and

organizational change, resulting in an enhanced workplace that reflects core person centered thinking principles of respect, trust, partnership and collaboration. As an organization is strengthened by person centered practices deeply embedded in daily work, employees in turn, are better equipped to provide person centered services and supports to people with developmental disabilities and their family members.

This publication highlights stories about the collective journey of six organizations, each unique in size, geography and composition, but all equally committed to creating positive change through person centered practices. Included are reflections on our accomplishments, key insights and recommendations in support of other organizations seeking to introduce a person centered thinking culture within their own workplace. Collaborative partners describe how

these practices have impacted the work culture of their agencies and the lives of individuals they serve who live with a developmental disability.

Read about our partnership with the University of California, Santa Barbara to learn about the impact of Person Centered Thinking practices. Results of the collaborative work and research suggest that Person Centered Thinking is a promising practice that contributes to enhanced organizational culture and improved personal outcomes for persons with developmental disabilities.

This publication also provides an overview of seven foundational Person Centered Thinking Tools, developed by the Learning Community for Person Centered Practices. We hope that by sharing what we have tried and learned during this initiative we will encourage other organizations to create person centered environments.



Person Centered Thinking (PCT) is a set of principles and core competencies that is the foundation for person centered planning. Person Centered Planning is a guided process for learning how someone wants to live at home, at work or in the community and developing a plan to help make it happen. Person Centered Thinking Tools provide practical strategies for gathering meaningful information and facilitating conversations about goal setting, problem solving and action planning. This process ensures that focus remains on the perspectives of individuals affected by the issue or outcome.

Person Centered Thinking also provides a framework for building effective relationships and opens the door to greater collaboration and planning in partnership. This in turn, increases the likelihood that the individual receiving services or the employee receiving supervision will be heard, valued and better equipped to attain the quality of life they seek at home and at work.

## Early Development of PCT

Our initiative subscribes to the Person Centered Thinking curriculum developed by the Learning Community for Person Centered Practices. This work evolved from the Essential Lifestyle Planning (ELP) approach, developed in the late 1980's by Michael Smull and Susan Burke-Harrison, to help transition individuals with developmental disabilities from institutions to their home communities.

At that time, traditional planning tools were identified as inadequate for learning 'who' a person was and fully understanding their preferences and needs. ELP identified a set of person centered thinking and planning tools that enabled many people to exceed the limitations of their existing labels and reputations, and transition into a successful community life. (Smull, et al., 2005)

In addition to the foundational tools in the PCT curriculum, organizations participating in this initiative have

embraced the "Planning Alternative Tomorrows with Hope" (PATH) process from Jack Pearpoint and Marsha Forrester as well as various applications of person centered practices, including Person Centered Supervision and Positive and Productive Meetings, developed by Helen Sanderson Associates. We continue to benefit from the shared learning and new applications of person centered thinking from colleagues around the globe who contribute to the Learning Community for Person Centered Practices.

## Benefit to Individuals

Being person centered means treating others with dignity and respect and empowering them to set and reach their own personal goals. A person centered approach recognizes the right of individuals to make informed choices, and take responsibility for those choices and related risks. It builds on the strengths, gifts, talents, skills, and contributions of the individual and those who know and care about the individual.

Families report that person centered thinking tools help them think about what is important to their son or daughter and assist them in formulating a plan to access supports and services. The tools also provide families with an effective way to communicate with professionals. Moreover, families report that a PCT approach enables them to gain the confidence needed to take initiative and have hope for the future.

## Benefit to Organizations

When applied to an organizational setting, Person Centered Thinking becomes a process of building and sustaining an organizational culture rooted in principles of developing employees, encouraging engagement and making decisions that are aligned with values of respect, trust and partnership.

If organizations provide a person centered work environment, they can be more effective in how they support their employees. In turn, employees will be more likely to practice person centered thinking as they support individuals and families who receive services. Modeling person centered thinking strategies in daily managerial and organizational work increases the likelihood that new practices are incorporated as a way of doing business.

## Our Initiative

The six agencies of the PCT Training Collaborative worked to apply person centered thinking principles across organizations. Read their stories about developing person centered practices.

“We set out to use Person Centered Thinking to align the mission of each agency with daily work practices and organizational outcomes as well as quality of life outcomes for people we support.”

~TINA CALDERARO-MENDOZA, PCT PROJECT COORDINATOR, TCRC

## Guiding Principles

One organization adopted these principles to align with person centered best practices.

### Listen for Understanding

- Assume the positive and possible
- Demonstrate objectivity
- Check for understanding before responding/acting
- Respond in a timely manner
- Seek input by those affected by a decision

### Be Realistic

- Be aware of scope of responsibility and authority
- Consider what is positive and possible
- Be honest about you can and cannot do

### Commit

- Determine what you can do
- Follow-through on what you have said you will do

### Practice collaborative decision making

- Honor and solicit different perspectives before making decisions
- Create working relationships internally and externally
- Create and use a framework of information for collective decision making

### Act on what you hear

- Model respectful language
- Take initiative to act when hearing a need and opportunity
- Bring closure
- Take responsibility for your personal choices and actions

~TCRC

# Introduction to Person Centered Thinking Tools

"Change begins with learning to plan with the person served and supported rather than planning for them."

~MIAN WANG, PHD, PROFESSOR OF SPECIAL EDUCATION, UNIVERSITY OF CALIFORNIA, SANTA BARBARA

**Important To / Important For**

Important to?

Important for?

What else do we need to learn/know?

## Purpose

This tool defines what is important TO and what is important FOR a person while working towards balance.

Important TO represents what matters most to a person as communicated in their own words or behavior.

Important FOR represents what is needed to keep a person healthy, safe and a valued member of their community.

## Benefits

- This tool differentiates the voice of the person receiving support from the voice of the professional or program.
- When we balance what matters most to a person and what is needed to keep them healthy and safe we are better equipped to provide supports that make sense.

## Possible Uses

- To better understand a person's wants and needs
- Before an action plan is created
- To help people get better lives

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## Example

Our service coordinators use the PCT tool, Important To and For to develop a plan that best reflects a person's needs, hopes and dreams. When legislation impacts policy, we also use this tool to engage our stakeholder community in conversations about what is Important To and For the person served, the service provider, regional center and the community at large to determine how best to implement system-wide changes. ~ TCRC

## PCT Tools

Person Centered Thinking training introduces seven PCT skills and tools as a way to build capacity for person centered practices. These function as tools for information gathering, decision making and action planning. Tools are applicable in working with individuals as well as within organizations. Throughout this section, examples of these tools are shared, the first of which is Important To / Important For. This tool is a core concept of Person Centered Thinking. It is the basis for deeper understanding and a lens through which additional tools may be considered. These tools ensure that the perspective of the person served is at the center of the process.

These tools are based upon the work of Michael Smull in collaboration with members of the The Learning Community for Person Centered Practices. The application of Person Centered Thinking in daily work affects positive change for both individuals and organizations.



# Part II: Strategies for Successful Implementation for Person Centered Practices

## Six Organizations Share Their Story

From 2007 to 2011, six partner agencies of the PCT Training Collaborative worked together to build organizational capacity for implementing person centered practices. The experiences were diverse as each organization utilized varying strategies on the path to implementation. The following stories highlight the accomplishments, challenges and insights of each organization.

- Tri-Counties Regional Center
- People Creating Success, Inc.
- PathPoint
- Channel Islands Social Services
- Genesis Developmental Services
- Eastern Los Angeles Regional Center



Tri-Counties Regional Center coordinates supports and services for children and adults with developmental disabilities living in San Luis Obispo, Santa Barbara and Ventura Counties so that they may live fully and safely as active and independent members of our community.

## Accomplishments

We launched a training initiative to build capacity for person centered practices. This multi-year plan includes training staff, service providers, families and adults served and other interested community members. Training in Person Centered Thinking is required of all new staff and reinforced through modeling and coaching support from managers. Communities of Practice, an opportunity to come together with others for sharing of learning, is offered in each regional location to augment training and build confidence in using PCT tools. Additional training opportunities are available to all stakeholders to embed person centered skills and practices in daily work and life.

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Early in the initiative, we designated a core group of staff and service provider partners to serve on a PCT Task

Force. The purpose of this group's work was to develop a strategy to embed person centered practices across the organization. A pilot group gradually expanded to an agency wide implementation process through the support of various sub committees, the work of the TCRC leadership team and a dedicated PCT Coordinator position. Ongoing collaboration with partner agencies has contributed greatly to the success of the initiative.

Our commitment to person centered practice has contributed to the following organizational changes that reflect a significant shift in our work culture:

- By adopting a guiding principle to be "Person Centered in All We Do", we remain focused on our goals around expansion of this initiative.
- Our commitment to using "People First Language" contributes to a more respectful environment, help-

ing us focus on individuals, rather than disabilities.

- Revisions to policies, forms and documents such as our IPP (Individualized Program Plan) reflect person centered principles.
- Use of PCT tools creates an environment in which issues are discussed openly and differing views are respected.
- Positive and Productive Meetings principles are applied in various group settings, allowing participants to be heard, and resulting in more efficient planning and problem solving. We strive for continuous improvement through periodic review and revision of strategic objectives to support this initiative.

We share what we have tried and learned among our agency teams, with our partner agencies, and with The

Learning Community for Person Centered Practices. Hosting events such as Communities of Practice and the annual California Gathering for Person Centered Practices provides further opportunity to learn from one another and to be inspired by new ideas. These experiences promote partnership and enhance the quality of our collaboration to provide services to individuals with developmental disabilities.

## Challenges

An ongoing challenge for the organization is reserving dedicated time for training and coaching support in light of increasing workloads and diminishing resources. It is also challenging to effectively communicate and share learning between departments and across the three counties served.

The current training curriculum is geared to staff and service providers. There is awareness that we must modify the content to be more relevant for individuals served by the regional center and their families, as well as find ways to make it more accessible to them.

## Insights

- For optimal success, the person centered thinking initiative needs designated leadership.
- Training is essential, but training alone is not enough. Staff need opportunities to practice what they have learned in order to take person centered thinking from skill to habit. Additional support can help staff generalize the skills to various aspects of their work.
- Implementing an initiative with partner organizations increases the likelihood of sustainable change. Working together builds relationships and creates common approaches to planning and problem solving.
- It is important to monitor the progress of the initiative. Periodic evaluation creates opportunities to celebrate progress, address emerging issues and guide next steps.

## Looking Ahead

- We are “Person Centered In All We Do”
- We are incorporating person centered principles into job descriptions, competency models and performance reviews. This helps us to define our work culture and ensure that our employees share and uphold our values.

- We will participate in the vibrant learning community in California. Toward this end, we will utilize new technologies to facilitate access to resources and shared learning. Making resources available in a variety of formats and platforms is both cost effective and addresses the needs of a diverse group of stakeholders.

### Learning Log

<p style="text-align: center; color: purple; font-weight: bold; margin: 0;">What did the person do?</p> <p style="font-size: small; margin: 5px 0;">What / when / where?</p> <p style="font-size: small; margin: 0;">How long did it take?</p>	<p style="text-align: center; color: orange; font-weight: bold; margin: 0;">Who was there?</p> <p style="font-size: small; margin: 5px 0;">Names of staff? Names of friends/ others?</p>	<p style="text-align: center; color: green; font-weight: bold; margin: 0;">What worked well?</p> <p style="font-size: small; margin: 5px 0;">What did the person like? What needs to stay the same?</p>	<p style="text-align: center; color: teal; font-weight: bold; margin: 0;">What did not work well?</p> <p style="font-size: small; margin: 5px 0;">What did the person not like? What needs to be different?</p>
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### Purpose

Used to achieve greater insight in a given situation. Captures critical learning over time that can inform the planning process. This tool may be used in organizational settings or to support a person served. It can replace traditional progress notes when used for the latter.

### Benefits

Acting on the learning that is captured over time can have a positive impact both on the quality of life of the person receiving support and an organization.

### Possible Uses

- When someone is new to a service
- When trying a new activity
- When there is a new match
- When teams are learning the impact of a new approach, program or service
- When recording actions & learning related to an organizational goal or project

### Example

The Learning Log has been used by our Person Centered Thinking trainers and mentors to capture our learning as we deliver the PCT training curriculum, and from that find ways to further improve our presentation. It provides us with a way to record and organize our learning so that the trends and needs can be quickly identified, while promoting critical thinking and reinforcing our learning culture. ~TCRC



People Creating Success, Inc. provides services for adults with disabilities through adult residential homes, supportive living services, independent living services, alternative to day program supports, and a behavior modification program. The goal of People Creating Success is to enable individuals with developmental disabilities to live rich and meaningful lives as equals in their community by providing supportive services tailored to their specific needs.

## Accomplishments

We have been using the tools to help staff understand our person centered philosophy. Our organization supports young people moving into an independent living setting for the first time as well as individuals who have lived in the Developmental Centers or Residential Homes for years. PCT has helped both family members and other circle of support members including support staff recognize how a person's needs can be met as well as clarify and communicate what can and cannot be done.

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As a result of these practices, Support Meetings are more focused on topics that are important to the person served and on acknowledging the positive. Persons who are supported are more

involved in planning for and participating in their own meetings. When given the invitation to be creative when preparing for their meetings, individuals are extremely enthusiastic and eager to change the way their meetings are held. Some are choosing to build their agenda and share information using PowerPoint presentations, pictures and videos, all prepared in their own words.

Our organization is most proud of the fact, that due to regular use of the tools, we have seen a shift in the way the information is used from structured technique to a more natural work flow.

## Challenges

There is a constant need for training new staff and we are challenged to

find ways to balance support needed by new staff with the more advanced needs of veteran staff. This is still a work in progress as we determine how to keep our training program relevant and fresh for all staff.

## Insights

We have changed our practice to get the nuts and bolts paperwork required from each agency done prior to the meeting. This has allowed us to really focus on the person during the meeting.

The use and application of the tools varies with different audiences or teams according to purpose and desired outcome. PCT has helped us to get more people involved in planning their meetings and their lives. Five years ago, individuals attended their

"There are so many responsibilities that are regulation driven. Whenever you can be creative and utilize the input from everyone, you can achieve greater buy-in and satisfaction."

~MEREDITH CATALINI, VICE PRESIDENT, PROGRAMS, PCS

meetings, but we weren't really following their agenda. Today, people we support can create their own Individual Support Plans (ISP) that drive the meeting agenda.

Senior management is using these tools to facilitate the interaction of our work teams. We also now invite all staff to contribute in activities such as our strategic planning work. This is a new approach for us. We know that all staff have something valuable to bring to the table. When we bring everyone together and give them a voice, there is greater ownership for our decisions.

## Looking Ahead

We are expanding our organization into a new geographic region, providing us the opportunity to build the business with PCT principles from the ground up.

We hope to have a few more PCT Trainers on board and possibly a Mentor Trainer.

We want to further integrate PCT into the work processes of our leadership.

**What's Working / Not Working**

Working:	Not Working:
Perspective of:	Perspective of:
Working:	Not Working:
Perspective of:	Perspective of:
Working:	Not Working:
Perspective of:	Perspective of:
Working:	Not Working:
Perspective of:	Perspective of:

### Purpose

The Working/Not Working tool helps individuals to reflect on what is working well and not working well in someone's life. This tool separates varying perspectives, helping everyone to have a voice in the planning process. It is also beneficial for action planning.

### Benefits

- Identifies aspects of a person's life that are important or currently working
- Provides an opportunity to consider multiple perspectives
- Maximizes positive control over important decisions

### Possible Uses

- As a negotiation tool to help people share in the planning process
- As an evaluation tool to determine what needs to change, remain the same or be enhanced
- As an aid in the development and review of goals

### Example

We used the Working / Not Working Tool to resolve a conflict between two agencies. Leadership from both agencies met in person. This tool helped analyze the situation from multiple perspectives. Common themes emerged around communication, decision making, and turnover experienced on both sides. We identified areas of concern, discussed the issues, and reached agreement on how to work together more effectively. Given the professional and honest nature of the meeting, all parties felt heard and gained a greater respect for the business processes of the other. ~ PCS



PathPoint offers supported employment and housing support services in California, serving over 2,000 people each year in the five counties of San Luis Obispo, Santa Barbara, Ventura, Los Angeles and Kern. The mission of PathPoint is to provide comprehensive training and support services that empower people with disabilities or disadvantages to live and work as valued members of our communities.

## Accomplishments

Early in our adoption of Person Centered Thinking practices, we sought to incorporate the principles into the work flow of our organization. We introduced the concepts to all of the staff, providing training in Person Centered Thinking, and incorporating these practices into our culture. It took about two years to accomplish the integration of the practices.

Our first major accomplishment was to influence the culture by adopting “People First Language” across the organization. We no longer refer to people as ‘clients’ or ‘consumers’. We respectfully refer to people as people! At first there was a lot of resistance. Staff thought it was just a fad that would pass. But by insisting that all of our documents and all communications going out of

the agency must use People First Language we really began to see a shift in the culture of our organization. The power of words made a difference.

We took steps for two managers to become certified as Person Centered Thinking trainers. We remain committed to training all new staff within their first year of employment. It is not easy for these trainers to find time for their additional duties, but we all pitch in to make it work.

We recognized that ongoing coaching support after completion of Person Centered Thinking training is essential for maximizing the return on our training investment. In response, we created an opportunity for participants to practice using tools and share their successes, challenges and questions. Staff participate through video con-

ferencing from multiple locations. We have reached the point where team members from one division can conduct a teach back with a story to show the rest of us what they did and what was accomplished in the person’s life.

## Challenges

We observe significant differences among our staff in both the depth of understanding and ability to use PCT tools. To some it is a piece of paper, others understand that it is part of a process.

Similar to other agencies in our field, we experience a fair amount of staff turnover. We have charged ourselves with maintaining two certified trainers on staff to meet ongoing training needs. We continue to develop strategies to identify staff who have the right combination of skills, ability, interest and desire to be trainers.

"Now that we have incorporated PCT tools and training into our organization, we are gathering information we were not able to get before we had these PCT tools. We are also doing a better job of hearing people's perspectives. Person Centered Thinking has really completely changed the way we think about the work that we do.

~LISA PADGETT, VICE PRESIDENT OF QUALITY IMPROVEMENT, PATHPOINT

## Insights

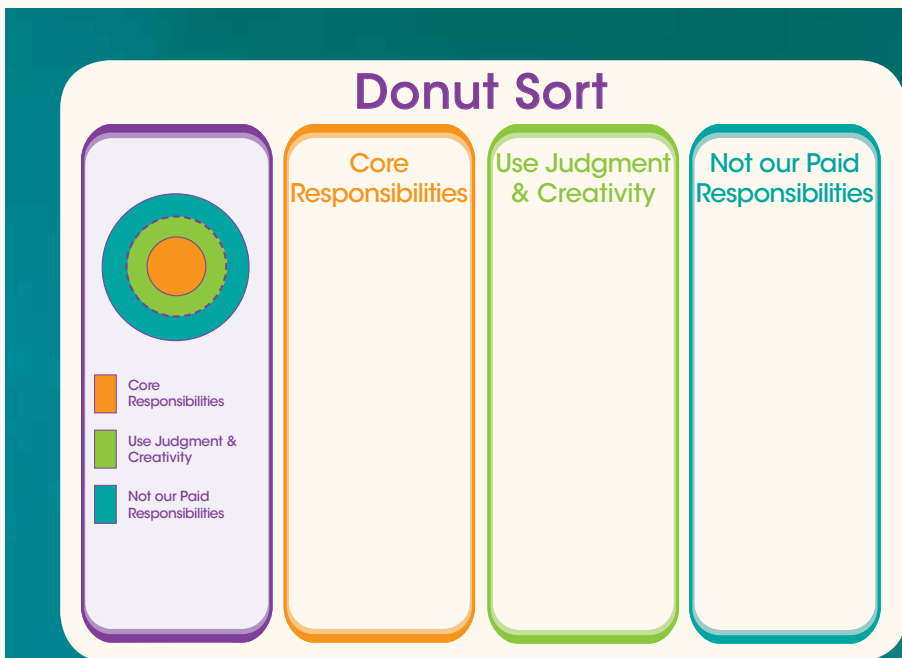
Person Centered Thinking is a cost effective practice. We have tracked the costs by keeping detailed information including staff time, travel, and training expenses. While there was an initial financial investment up front, our analysis shows us that person centered practice pays off in the long run.

We were not anticipating this, but our person centered initiative has resulted in a more positive work culture. We started by incorporating Positive and Productive Meetings principles in our management meetings and it began to trickle down to unit teams and to planning meetings with individuals we support. When we started, our turnover rate of staff was 30% and it is currently 12%. Although economic factors can't be ruled out, we believe this improvement is due in part to the change in our work culture.

Person Centered Thinking tools are also useful in general operations. For example, we regularly debrief our Emergency Drill exercises by using the Working/Not Working tool. We also use the Four Plus One questions for conflict resolution and planning within the organization. As a result, our work as an organization is more efficient and more effective.

## Looking Ahead

In these difficult economic times, we feel it is important to prioritize PCT Training, and have therefore included it in our CORE training. We also plan to continue monthly "Tool Time" practice sessions in which staff learn how to use specific tools and get feedback from a certified trainer.



### Purpose

The Donut tool clarifies roles and responsibilities in a given situation.

### Benefits

Clarity about roles and responsibilities helps to increase satisfaction and decrease confusion and duplication

### Possible Uses

- When multiple providers want to prevent overlaps and gaps in services
- When different teams are figuring out a new business process
- When a staff member is clarifying roles and responsibilities and determining what they must do, can do, and should not do
- When clarifying job expectations for new employees

### Example

One of our teams was supporting a person who has multiple support needs and numerous services in place. The Donut Sort was used with the person served and supporting agencies to clarify how multiple partners could come together to provide services to this individual, and ultimately reduce duplication of services and increase communication. All of these efficiencies result in a better experience for the person served. ~PathPoint



Channel Islands Social Services is dedicated to providing collaborative services and supports that are reflective of individual needs and strengthen families. We do this by providing quality in-home respite care to families throughout Ventura County.

## Accomplishments

- We introduced PCT principles and tools to staff during monthly staff meetings. We find that applying them to relevant issues increases learning while enhancing our business practices.
- Staff have created One Page Profiles for their own use and assist families in updating the profiles of the children they support. Use of the Donut tool has been helpful to clarify understanding of their job descriptions.
- We use a variety of PCT tools to gather critical information when first introduced to a child and when developing semi-annual progress reports.
- Staff are also trained on concepts of Important To/Important For and Circle of Support. We use a combination of person centered approaches to map how the individuals support-

ed by staff can become more active participants in their community.

- The Matching Support tool has been particularly useful in learning about a child's and family's needs, and the characteristics they are looking for in a respite caregiver.
- We have translated the Matching Support tool to Spanish to ensure that our Spanish speaking families benefit from this practice. All of the additional materials used to gather information are translated as well.
- Use of person centered practices has helped us develop an environment in which staff and families feel listened to and valued.

## Challenges

Our staff, comprised only of part time employees, is not able to attend full day trainings. To address this issue we have had to figure out how to infuse person

centered practices in creative ways, such as promoting person centered thinking through newsletter articles, and modeling what we want to see.

## Insights

- We have been able to implement person centered practices even with a part time work force; it can be done if it is valued and placed at the center of business practices.
- Implementing person centered principles throughout the organization allows us to be more responsive and creative in our approach to working with families.
- Since we began using the Matching Support tool we have observed increased stability in staff matches. Even when dealing with significant behavioral challenges, the quality and richness of the relationship between staff and family has played a role



“Since we began using the matching support tool we have observed a significant improvement in the stability and satisfaction of caregivers we have matched with families.”

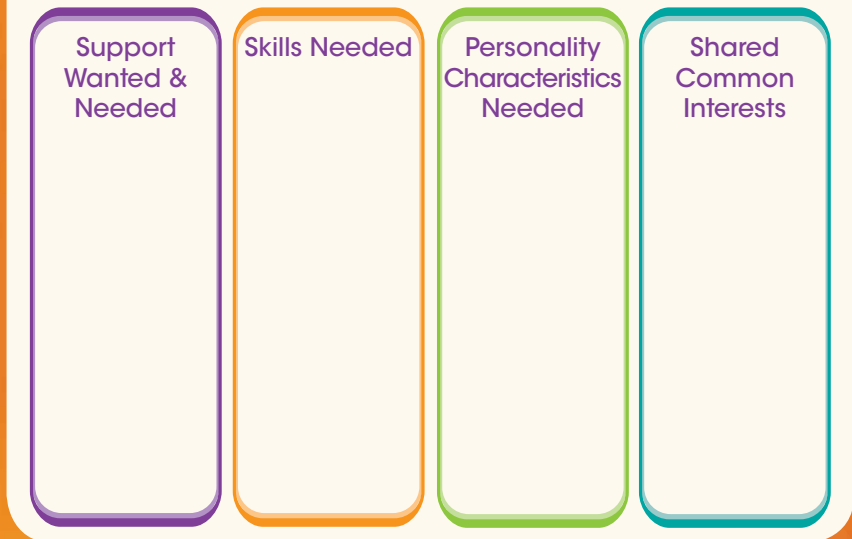
~EDITH WYSINGER, FAMILY SERVICES MANAGER, CHANNEL ISLANDS SOCIAL SERVICES

in stable and long term matches. Overall, this increases both family and employee satisfaction and at times long term relationships develop and transition from paid to a natural support.

## Looking Ahead

We have used the person centered thinking tools to enhance the quality of services. As a result we are exploring avenues to serve other children with special needs and their families through an expanded scope of service. This could generate new opportunities to help us remain a strong and viable organization serving Ventura County.

## Matching Support



### Purpose

The Matching Support tool outlines a process to determine the skills, supports, and personality characteristics needed to make the best match between a person needing support and a service provider.

### Benefits

When there is a good match between an individual and the support staff:

- Quality of life is likely to improve
- Job satisfaction increases
- Staff turnover decreases

### Possible Uses

- When supporting a person with a new activity or interest
- When seeking staff input about desired characteristics for a new team member
- When making decisions about assigning staff to projects and job duties

### Example

When we use the Matching Support tool, parents tell us that they feel heard and appreciate our staff and caregiver's ability to connect on a personal level with their children.

Caregivers experience more satisfaction in their work as a result of being matched with a family that appreciates their skill and personality. Should a change need to be made, both caregivers and families know that the Matching Support tool can be utilized to find better pairings.

We use the same tool with our staff to learn about their interests and personality in order for a successful match.~CISS



Genesis Developmental Services provides increased opportunities for individuals with developmental disabilities to experience life in the community. Their mission is to empower the individuals they serve by providing them creative living options and day program services that support their choices, personal growth and connection to the community.

## Accomplishments

Genesis Developmental Services' five year journey to become a Person Centered organization began with strong commitment from our Board of Directors and senior management. From this foundation, the PCT approach has spread throughout our organization. We provide PCT tool training with senior management as trainers. Two people in our agency are certified as Person Centered Thinking trainers. We use one page profiles for each person that we support.

the pilot organizations of a recently launched person centered change initiative at Golden Gate Regional Center in San Francisco.

The PCT philosophy is a way of conducting business from the CEO down to the newest Direct Support Professional.

## Challenges

As we experienced the culture shift in our agency, we realized that not all partner agencies were adopting PCT at the same pace. There is a need for time to adopt training processes, observe learning, and document understanding. It is not realistic to expect that organizations will embrace change at the same speed. How do you address that? You respond with patience and perseverance, all within the framework of collaboration.

We continue to seek effective ways of engaging families to try new approaches to planning.

It is more difficult to affect change when all parties are not willing or able to adopt person centered practices.

## Insights

Make certain that promises are kept and encourage openness and respect by modeling person centered practices. This in turn builds confidence and creates trust.

For Person Centered Thinking to be successful, there has to be a shift in power which results in individuals having more ownership of decisions that affect them.

Providers and regional center service coordinators must transition from prior

We are now represented on the advisory team and participate as one of

“PCT has given us a common language and set of standards that translate universally through our agency. It gives our managers tools to decrease challenging behaviors, communicate effectively with our partners and create clear goals and plans that actively support those we serve.”

~LAUREN CONNOLLY, DIRECTOR OF STRATEGIC PLANNING, GENESIS DEVELOPMENTAL SERVICES

paradigms and begin to operate in real partnership in order to take full advantage of the opportunities afforded by the Person Centered Thinking process.

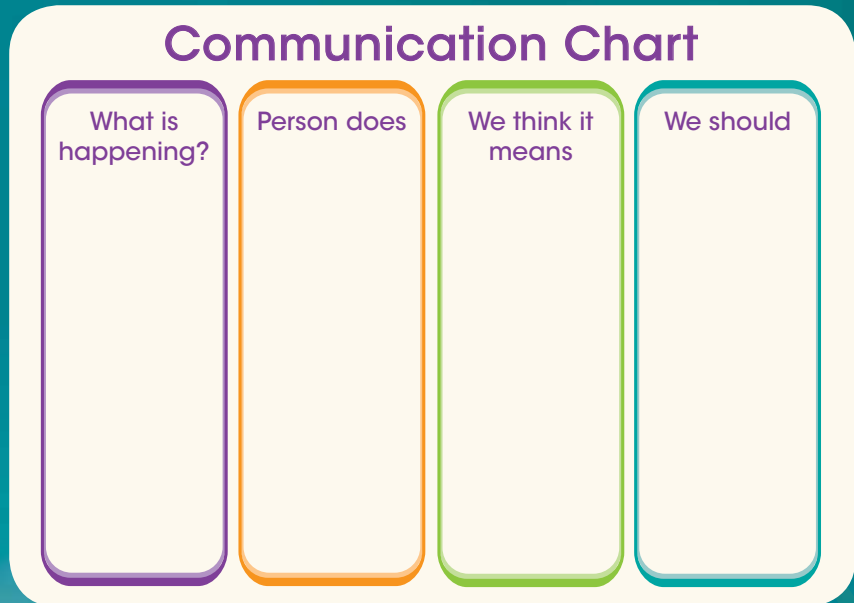
A person centered approach allows individuals served to become decision makers for the more important things in their life. When people are involved in decisions that affect them, they are likely to be more content and exhibit fewer challenging behaviors. This can result in a decrease in needed services and ultimately save time and expense. PCT tools can be effectively used to build and enhance teams; they provide a structure for communication, giving voice to varying perspectives.

## Looking Ahead

We intend to continue the training of new support persons as well as increase the skill level in the use of the tools of those previously trained. Our agency also will offer training to the community several times a year.

To support our initiative, we will participate annually on the planning team for the California Gathering and send agency representatives to the annual, international gathering of The Learning Community for Person Centered Practices.

A cornerstone for sustaining our person centered initiative is our continued participation in regional PCT collaboratives and task forces.



### Purpose

The Communication Chart helps us better understand how someone communicates. It provides an easy to use template to record our learning and informs us about what we need to do to support the person well.

### Benefits

Figuring out better ways to support people is likely to happen faster if we understand how someone communicates and how we can communicate and support them best.

### Possible Uses

- When trying to understand what or how someone is communicating
- When getting to know someone and learning how to provide good support

### Example

John is an individual we support who presents with a number of behaviors. Although verbal, it is often difficult to attach meaning to his verbalizations. Our understanding of John’s needs and communications was dramatically improved with the use of the Communication Chart. By tracking chart entries we were able to adjust our observations over time and gain clarity regarding John’s comments. The result has been an obvious increase in John’s sense of happiness and satisfaction and a corresponding decrease in his frustration and challenging behaviors associated with not being understood.  
~GDS



“We see ourselves forever joined in our passion for person centered thinking.”

~ LIZ HARRELL, SUPERVISOR, INFORMATION & TRAINING, ELARC

Eastern Los Angeles Regional Center Mission statement is committed to serving individuals with developmental disabilities and their families by promoting partnerships which empower them to achieve meaningful and fulfilling lifestyles in their community.

## Accomplishments

Training is an important part of our implementation of person centered practices. All staff are required to complete Person Centered Thinking Training delivered over four weeks. We participate in additional workshops that enhance knowledge of how tools can be applied in their daily work. Workshops include Person Centered Teams, Coaching, Positive and Productive Meetings, Person Centered Supervision. ELARC staff, Liz Rodgers, has been certified by The Learning Community for Person Centered Practices and assists us in meeting our training goals.

to provide vision, planning and guidance for the initiative. The PCT Task Force, comprised of representatives from management, Community Services Department, Consumer Services Department, specialists, and Service Coordinators, provided the initial planning to launch the initiative. The responsibilities of this time limited group were eventually transferred to the PCT Liaison Committee and Core Coaches Group. The PCT Liaison Committee, focused on implementation, is made up of Service Coordinators from each unit, and led by ELARC's PCT Trainer. The Core Coaches Group is made up of supervisors and specialists. The Liaison group met more regularly and took over the planning and implementation of PCT activities.

We created a skill practicing opportunity for staff called 'Tool Time', in which members of the Core Coaches Group

demonstrate a PCT tool for staff. This provides staff an opportunity to practice applying person centered tools using specific case scenarios.

We modified our Individual Program Plan (IPP) document to reflect a more person centered approach. After a successful pilot, we adopted the revised IPP for use by all Service Coordinators. We have developed a page for PCT on our intranet, for internal use among staff.

## Challenges

These have been harsh budget years with significant cuts in our regional center, reduced work schedules and increased workloads. Changes in the law have resulted in new rules and new demands, so finding the time to stay focused on person centered practices is harder.

Keeping people passionate can be challenging due to competing priorities. While we may not be able to progress as quickly as we like, the core group of people who continue to be enthusiastic and dedicated help us hold on to the long term vision of being a more person centered organization.

Ideally this would be a simultaneous effort between management and agency leadership. The leadership of the organization wants to see this happen, but in the day to day work it sometimes gets reprioritized. We are not yet at the point of integrating this across all functions of the agency.

It has been challenging to engage service providers to attend Person Centered Thinking training. However, those who do attend seem to embrace the tools and apply them within their agencies.

## Insights

Despite the challenges, it has not been diminished that being a person centered organization is still the vision of our agency. We are proud of the fact that we now have a certified trainer on staff. This reflects our commitment, and makes it possible for new staff to be trained and immersed in person centered practices right when they walk in the door.

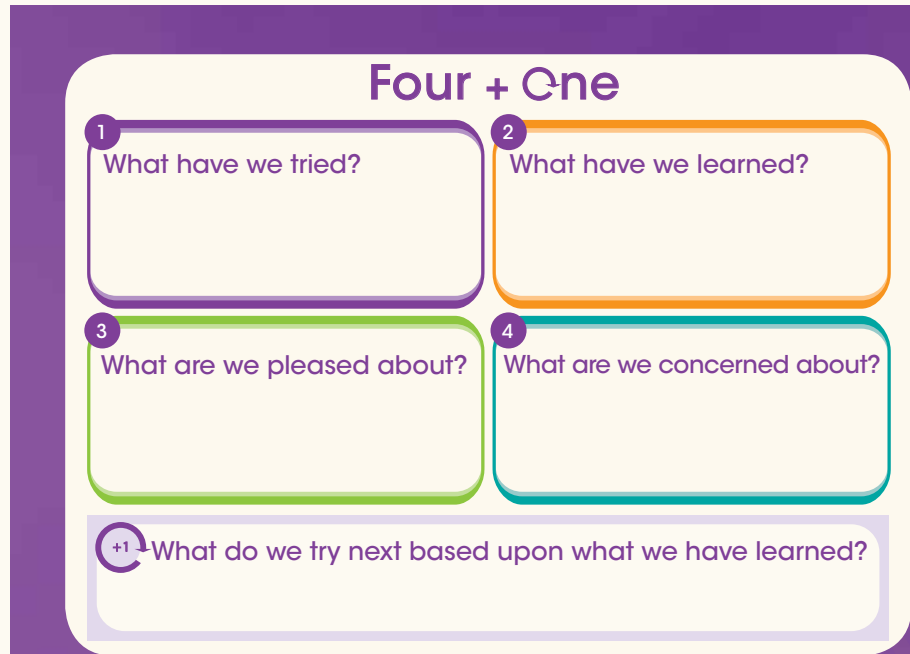
Using relevant situations for practice makes a difference: employees are more inspired to apply the tools when they can see the benefit in actual work situations.

Some seasoned employees feel that their work practices are already person centered without utilizing PCT tools, while new staff are enthusiastic about learning new techniques. It is important to acknowledge the existing person centered approaches used by staff. We are more effective when we appreciate seasoned staff for their natural use of PCT, and nurture the enthusiasm of new staff through continuous involvement in PCT activities.

## Looking Ahead

We hope to introduce PCT tools to more individuals who receive services and their family members by increasing access to community training opportunities.

We strive to sustain a high level of commitment to PCT as part of the agency's best practice.



### Purpose

The Four + One tool allows participants to reflect on their learning and from that learning take action to move a situation forward.

### Benefits

- To reflect on previous experience prior to taking action
- To allow everyone to be listened too and heard

### Possible Uses

- Then updating and reviewing plans of support
- When understanding multiple perspectives is important
- When uncertain of how to move a situation forward

### Example

We used the Four + One tool to figure out how to sustain PCT work at our regional center and how to have a Person Centered Thinking Trainer in our local area. If we had not used the four plus one approach to problem solving we might not have found our way. We were able to listen to one another to understand all that we had tried and learned and explore what we were pleased and concerned about. This led to a more creative action plan. When the solution comes from the organization, it becomes organic. ~ELARC

# Part III: Lessons Learned from our Collective Experience



The previous stories of six organizations highlight some common themes that proved to be essential elements of a successful and sustainable implementation of person centered practices.

For those just getting started and those looking to sustain this work over time, we share our lessons learned.

## Getting Started

**SECURE BUY-IN.** Gain support from senior level management from the beginning. In addition to lending conceptual support, senior leaders must be willing to demonstrate the application of person centered thinking in their managerial work. When seeking buy-in from all staff, communicate the purpose and rationale for launching a person centered thinking initiative and convey to staff how PCT can help them accomplish their work more effectively and efficiently.

**ESTABLISH THE RIGHT LEADERSHIP.** Develop an infrastructure to provide leadership for the initiative. Identify a person or a group of people who have passion for the work, group facilitation skills, and access to decision makers in the organization. Clarify their core responsibilities and their scope of authority.

**TRAIN ALL STAFF.** Provide Person Centered Thinking training to staff in all departments and all levels throughout the organization. This provides the foundation needed to understand the core concepts and establishes a common framework for approaching collaborative tasks.

**FOSTER A CULTURE OF LEARNING.** Involve managers in coaching staff to build confidence in using person centered thinking tools and practices. Facilitate embedding skills in daily work by providing opportunities to practice. Develop additional training support in response to the unique needs of your community.

**ALIGN POLICIES AND PROCEDURES.** Revise the language and intent of internal business processes and policies to better reflect PCT values and principles. This may happen over time as opportunities arise in the regular course of business.

**22 IMPLEMENT TOGETHER.** Take advantage of local opportunities, including Task Forces, committees or gatherings to learn and practice with others. Effective implementation of Person Centered Thinking requires a shared understanding and commitment by different audiences including regional center personnel, direct service and support providers, and individuals served and their families.



## Sustaining the Practice

**BE STRATEGIC.** Incorporate PCT core values and principles into an existing strategic plan or develop a strategic plan for implementation of PCT in your organization.

**ENGAGE STAKEHOLDERS.** Engage individuals and families served in person centered practice through planning meetings and outreach efforts. Educating others about person centered practices can empower them to take a greater leadership role in their own life planning.

**ESTABLISH ACCOUNTABILITY.** Incorporate PCT values and practices into job descriptions, competency models, and performance evaluations. Clarify what you expect of staff. Develop strategies to ensure that others are using the concepts, tools and strategies appropriately and consistently.

**DEVELOP TRAINING INFRASTRUCTURE.** Create a sustainable, cost-effective way of providing training by supporting the certification of local PCT trainers and mentors. This may address training needs due to staff turnover and sustain outreach in your community.

**SHARE LEARNING.** Create opportunities in which participants may share experiences, new applications, and change in practice to achieve a deeper understanding of PCT. Find ways to document and communicate your progress.

**FOCUS ON OUTCOMES.** Identify indicators of positive impact on quality of life and take steps to measure progress over time. This will ensure that your person centered change initiative remains focused on fulfilling your organization's mission.

**SEEK TO INFLUENCE.** Gather evidence of success and positive change. Look for opportunities to use your results to create change at the system level.

“PCT has helped our organization to become stronger and more effective as it has improved the communication within and between departments.”

~LIZ HARRELL, EASTERN LOS ANGELES REGIONAL CENTER

# Part IV: Building Competence and Commitment



“Person centered practices help us do our work better and take our good practice to the next level to provide great support.”

~ LIZ RODGERS, PCT TRAINER, EASTERN LOS ANGELES REGIONAL CENTER

## Becoming a PCT Trainer

To begin the PCT Trainer Certification process, each trainer candidate will meet with a Mentor Trainer to review all requirements and create a plan for learning.

Milestones include:

- Complete PCT Training
- Demonstrate skills in applying PCT Tools
- Observe PCT Training while following instructor manual
- Meet with Mentor Trainer to prepare first training demonstration
- Study training materials & coordinate event logistics
- Deliver PCT Training at least twice under observation of Mentor Trainer
- Incorporate feedback to refine instruction methods
- Write & submit at least two Person Centered Plans

Learn more at The Learning Community for Person Centered Practices ([www.learningcommunity.us](http://www.learningcommunity.us)).





## Continuing to Learn

### PEOPLE FIRST LANGUAGE

This convention puts the person before the disability, moving from “client-hood” to “citizenship in their community”. According to People First of San Luis Obispo, “Any term used to describe us as a group, however well intended, eventually becomes a label that creates a negative stereotype about people with disabilities.”

### COMMUNITIES OF PRACTICE

Local sessions are held regularly to practice new skills in a safe and supportive environment. These opportunities enhance skills and provide new insights about how to apply person centered practices in daily work.

### POSITIVE & PRODUCTIVE MEETINGS

Developed by Helen Sanderson Associates, this collaborative process creates a respectful and supportive environment that enables people to think clearly and therefore do their best work. Positive & Productive Meetings training looks at four components of meetings, Purpose, People, Process and Progress and offers practical tools and strategies to transform the culture of any meeting and make it more efficient, more positive, and more productive.

### PERSON CENTERED REVIEWS IN SCHOOLS

These reviews represent a process in which critical information about someone is shared and used to support the person in achieving what is most important to them. The person centered review pulls together learning from a number of person centered thinking tools to reflect on the big picture and plan for the future.

### CA GATHERING FOR PERSON CENTERED PRACTICES

During this regional, annual event individuals served by the regional center and practitioners come together to share learning and explore new applications of person centered practices. It is a learning summit that is designed by participants for participants.

### SPECIFIC APPLICATIONS

Supplemental training events address specific areas of interest. Participants explore topics including how to apply PCT with children and families, with older adults, and when planning for healthcare and chronic illness or end of life decisions. Other topics focus on applications in the workplace such as person centered supervision and developing person centered teams.



Effective person centered practice requires that staff become both competent in applying skills and committed to the purpose of the initiative. This evolves over time and can be observed in five levels of staff engagement including Beginning, Exploring, Implementing, Embracing and Contributing. The left column represents behaviors often observed in staff members moving from being introduced to person centered thinking to being fully engaged and actively contributing to a person centered organizational culture. The right column exemplifies the support needed from the organization to encourage increased staff engagement. Organizations pursuing this work suggest that progress along this continuum may take several years.

**BEGINNING**

- HOW STAFF MOVE FROM SKILL TO PRACTICE:**
- Understand basic PCT concepts, values and potential benefits
  - Complete PCT training
  - Contemplate first steps to implementation

**EXPLORING**

- Practice People First Language
- Determine relationship of PCT to job
- Observe tool use
- Learn the 'mechanics' of the tools and ask questions

**HOW ORGANIZATIONS SUPPORT THEIR LEARNING:**

- Introduce PCT principles at New Employee Orientation
- Ensure that managers and supervisors model PCT tools during staff meetings and follow concepts of PCT supervision
- Offer Introductory PCT training within the first six months of employment
- Encourage a performance goal targeting PCT skill development
- Inform staff of the organization's expectations, values, and ethics
- Ensure that managers guide staff in development of one page profiles
- Facilitate staff observation of tool use in meetings or the field
- Facilitate access to coaching support
- Encourage tool use in new situations
- Encourage staff to seek new forums for practice such as attending Communities of Practice or supplemental trainings
- Teach staff to facilitate planning meetings using PCT tools

## HOW STAFF MOVE FROM SKILL TO PRACTICE:

### IMPLEMENTING

- Introduce a PCT tool in a meeting
- Share learning when asked
- Utilize tools and be able to describe benefit
- Understand how PCT applies to job
- Seek opportunities to practice
- Seek ongoing learning opportunities

### EMBRACING

- Participate regularly in local Communities of Practice
- Share learning with partners
- Model PCT tools and facilitate use of more complex PCT tools
- Use the tools to plan and resolve differences
- Apply PCT to new situations and settings
- Introduce PCT to new partners, families and individuals; encourage individuals served by the organization to become facilitators

### CONTRIBUTING

- Take ownership of personal PCT practice
- Identify new areas of improvement and applications of the work
- Serve on PCT committees and task forces
- Build a strategic network by generating interest and enthusiasm for PCT
- Facilitate local trainings
- Write stories exemplifying PCT
- Facilitate more complex meetings
- Coach others on PCT applications
- Identify strategic ways to further embed PCT values and practices on an individual and organizational level

## HOW ORGANIZATIONS SUPPORT THEIR LEARNING:

- Create opportunities to facilitate tool use and reflect on learning with others
- Encourage staff and management joint participation in shared learning opportunities including PCT task forces, Communities of Practice and online forums
- Promote attendance at supplemental trainings such as Positive & Productive Meetings, Person Centered Supervision, and Person Centered Teams Training
- Recognize staff for their participation

- Encourage additional training that transfers skill to new contexts including Moving from PCT Description to PCT Plan (IPP), Facilitation Skills, PCT Team Review, PCT Approach to Risk-adults, PCT Community Connecting, PCT Reviews in Schools, Person Centered Approaches to End of Life Planning, PCT Coaching, Positive and Productive Performance Development, and One Page Profile Training
- Support staff participation in large, regional conferences such as the CA Gathering for Person Centered Practices
- Support peer coaching

- Encourage staff leadership of PCT efforts, including facilitation of Communities of Practice, presenting at a regional conference or becoming a PCT trainer or mentor
- Assist staff to balance existing work load and PCT contribution
- Support PCT trainer participation in the international Learning Community for Person Centered Practices
- Recognize staff for their contribution



## The Cost & Benefits of PCT Training

Prior to launching a PCT initiative, it is helpful to consider the costs and benefits of training.

### Costs

#### Sending Staff Offsite

- Registration fees
- Staff time away from job & covering absence
- Travel & lodging as needed

#### Hosting Onsite Training

- Trainer/Consultant fees if applicable
- Facilities rental fees if applicable
- Staff time away from job & covering absence
- Presentation equipment
- Refreshments
- Administrative support for event

### Benefits

- Increased satisfaction of staff, people receiving services and their families
- Improved retention of staff and people receiving services
- Decreased hiring costs
- Reduced recruitment costs (training increases internal capacity for promotion)
- Improved workplace morale

## PCT Evaluation Project, University of California, Santa Barbara

Many positive outcomes addressed in the preceding agency stories were also reflected in the results of an independent evaluation. In a recent survey, Tri-Counties Regional Center collaborated with a research team from the University of California, Santa Barbara to examine the impact PCT has made on both the organization and the quality of life for individuals and families served by TCRC.

“Adults with developmental disabilities, receiving services from providers with a higher level of involvement in Person Centered Thinking practices, report a significantly higher perceived quality of life (QOL) than those served by providers with a lower level of involvement in Person Centered Thinking practices.”

~MIAN WANG, PHD, PROFESSOR OF SPECIAL EDUCATION, UNIVERSITY OF CALIFORNIA, SANTA BARBARA

### Impact on Individuals

Ninety-nine service provider agencies were surveyed to evaluate the impact of the PCT initiative on service delivery. Based upon self-reported information regarding PCT training experience and frequency of the use of PCT tools, these service providers were categorized into four levels in terms of their PCT practices: Intensive, Moderate, Little, and Not At All. Subsequently, a service impact survey was conducted with 173 adults with developmental disabilities and 66 families of children with developmental disabilities served by TCRC respectively.

Many adults and parents interviewed confirmed indirectly the use of PCT tools and strategies in planning meetings and other interactions with TCRC staff. They expressed their satisfaction with TCRC services that incorporate PCT practices (e.g., being listened to and treated respectfully, being given choice to discuss what's important to them, and being empowered to make decisions and set their desired goals). In addition, when asked if they believe that they have been empowered through PCT practices to gain better control in their own lives, many adults with developmental disabilities and families answered affirmatively.

### Impact on the Organization

“Not only do the TCRC staff interviewed acknowledge the positive changes resulting from PCT initiative and practices at the organizational level, they also believe that PCT practices have made changes on a personal level, affecting positively both their professional and personal lives.” ~Mian Wang, PhD.

Several TCRC staff members were interviewed to explore the impact of PCT on TCRC as an organization. Interview questions addressed the following topics:

#### Definition of PCT

- Barriers & Aids to Implementation
- Awareness of PCT initiatives and supports at TCRC
- Feedback on PCT Training
- Impact of PCT on individuals and families served
- Impact of PCT on Staff
- Recommendations for the Improvement of PCT

Responses indicate improved knowledge of Person Centered Thinking, enhanced work processes and positive changes in the workplace.

Participants reported that person centered practices led to more workable plans, enhanced problem solving, and improved efficiency of work. PCT also facilitated the inclusion of families' and individuals' perspectives.

Staff observed better relationships between colleagues, greater consideration of viewpoints among staff, and a more respectful work environment.



The stories and insights captured on these pages are testimony to the power of Person Centered Thinking. PCT tools are simple on the surface and yet, incredibly powerful when used to better understand others while helping them have greater control over how they choose to travel through work and life.

What you have read can serve as your guide for embarking on your own journey to enhance the way you work, the way you listen, and the way you support people. These are the keys to being more person centered and the keys to honoring the uniqueness of every human being.

"Similar to the philosophies of being client centered, family centered, or patient centered, a person centered approach seeks to keep the individual and his or her strengths, abilities and needs at the core of planning and decision making."

-MARY BETH LEPKOWSKY, ORGANIZATIONAL DEVELOPMENT MANAGER, TCRC

“An agency making this journey needs to realize that this is an ongoing process. To achieve excellence one must maintain patience and persistence. Mastery may be elusive, but one must strive to move closer and closer to the target.”

~RON DODGEN, CHIEF EXECUTIVE OFFICER, GENESIS DEVELOPMENTAL SERVICES

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[www.learningcommunity.us](http://www.learningcommunity.us)

[www.helensandersonassociates.co.uk](http://www.helensandersonassociates.co.uk)

[www.thinkandplan.com](http://www.thinkandplan.com)

language and set of standards that translate universally through our agency • through person centered thinking, our agency has been united one community focused on our mission • we respectfully refer to people as people • person centered thinking has increased awareness and



communication through the use of tools • with the tools, solutions happen naturally • person centered thinking gives our managers tools that facilitate effective communication with our partners to create clear goals and plans that actively support those we serve • whenever we can contribute to a person achieving something they desire, the staff satisfaction becomes obvious and significant • the focus on listening to one another and learning from different perspective leads the group to a more creative action plan • the power of words is really important • some people think of the tools as just a piece of paper others understand that the tools represent a process • our work as an organization is more