Progress
for Providers

Checking your progress
in using person–centered
approaches

Acknowledgments

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At Helen Sanderson Associates we envision a future where everyone is valued and appreciated as an individual. A world where we all get the support we need to thrive, in our communities, our workplaces and our personal lives.

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Checking your progress in using person–centered approaches (USA Managers)

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Introduction

Progress for Providers (USA Managers) is a practical self–assessment tool for managers and team leaders to use individually and with teams. The person–centered approaches outlined in each section represent suggested steps taken by many organizations to create environments in which people can thrive, employees as well as people who receive long term services and supports.

Using person–centered approaches helps people with disabilities to have more choice and control in their lives and helps staff to provide the best support they can in ways that reflect what is important to the person receiving support. Working in this way is not necessarily about doing more but doing things differently.

There are many different skills and approaches used by organizations in their efforts to work with people in a more person–centered way. Many of these have been developed and refined over a number of years in consultation with interested parties around the world. Others have been adapted from original person–centered planning efforts. Person Centered Thinking© skills developed by the Learning Community for Person Centered Practices are referenced throughout as a foundation upon which many organizations have cultivated a person–centered organizational culture that contributes to meaningful change.

An Explanation of Terms has been included in Section 4 to clarify the meaning and/or context of the terms used throughout this resource. If the skills and/or approaches in the examples differ from those practiced by the organization, the Explanation of Terms may assist managers in making comparisons and identifying progress.

For this resource to be implemented effectively, there must be connections between it and the organization's broader strategic directions and approaches. This is to say that the application of the practices suggested in *Progress for Providers (USA Managers)* at a frontline level needs to be supported throughout the organization. This resource will be most effective in organizations that have a clear understanding of person–centered practices and have a quality management system in place that supports this. With the different emphases in different sections, there may appear to be some duplication. This is deliberate to ensure that different elements of person–centered approaches are implemented in a multitude of ways, at all levels and across all functions of the organization.

Progress for Providers (USA Managers) is relevant for providers supporting people living with an intellectual/developmental disability, older people and those living with dementia or chronic health condition, as well as those working in health, education, employment, veterans' affairs, and other social services. Progress for Providers (USA Managers) recognizes the importance of seeing and understanding the support network around a person, including natural, unpaid support as well as eligibility–based support. This resource can be applied by organizations working with people with any kind of long term support need.

CMS Final Rule and HCBS Requirements

Progress for Providers (USA Managers) can be helpful when working towards meeting requirements of The Centers for Medicaid and Medicare Services (CMS) Final Rule of 2014. This CMS rule supports enhanced quality in Home and Community–Based Settings (HCBS) programs and adds protections for individuals receiving services. This rule reflects CMS' intent to ensure that people receiving services and supports through Medicaid's HCBS programs have full access to the benefits of community living and are able to receive services in the most integrated setting. Highlights of this final rule clearly outline elements of person–centered planning and practices to ensure people with disabilities have increased power to exercise choice and control in the pursuit of their goals and in the planning and delivery of supports. Progress for Providers (USA Managers) assists in this process of change by sharing practical ways for managers to embed person–centered approaches in support of individuals, teams and organizations.

How to use Progress for Providers – Checking your progress in using person–centered approaches (USA Managers)

Progress for Providers – Checking your progress in using person–centered approaches (USA Managers) can be used:

- By yourself, for individual self–reflection;
- With your manager, to agree on individual goals;
- With your team, to agree on team and individual goals;
- With other managers; for example, as a practice group, or as part of an organizational development program.
- With your organization to inform strategic planning for person–centered change.

Progress for Providers (USA Managers) is divided into four sections looking at:

1. Person–centered thinking skills and approaches
2. Supporting people to have choice and control
3. Creating a person–centered culture within teams
4. Action planning skills

This document also has an Explanation of Terms included at the back.

- If you are a frontline manager, all the sections will be relevant to you.
- If you are a middle or senior manager, Sections 1 and 3 will be most relevant.

Choose the statement in each section that best corresponds with your progress to date (statement 1, 2, 3, 4 or 5).

For example:

- If you are Getting started, you are likely to check the first one or two statements.
- If you are making Some progress, then perhaps the third statement.
- Good progress is likely to mean that you would check the fourth box.
- Excellent progress would mean that you are checking the fifth statement.

This resource is a self–assessment checklist that should help you identify what you are doing well and what requires improvement. While you can use it to promote the merits of your services, this is not the intended purpose, and may limit your

capacity to use it for genuine improvement. As an example, if not all elements of a statement are true for your organization or team, it is likely to be more beneficial to consider how improvements can be made on these specific elements, rather than checking the statement as complete.

Action and resources

Once you have assessed your progress as a manager and/or as a team, you can use this information to develop an action plan.

The action plan should describe how you are going to develop and change to move towards statement five (excellent progress). There is a section to record your next steps as part of this book. You may want to focus on a few actions in more depth. There are detailed action planning pages for this from page

A list containing further information has been provided in Section 4 to assist frontline managers and organizations, providing links to a range of resources that could help inform your action plan. These resources include publications, examples from providers and funding bodies, podcasts and web resources, courses and free downloads.

We hope you find this useful as a way of thinking about progress you are making using person–centered approaches to achieve change.

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Section 1

Person–centered thinking skills and approach
Knowledge, skills, and understanding

✔ Check one box

1	No one in my team has any understanding or experience of using person–centered thinking skills or approaches.	
2	We need to develop our skills, knowledge and understanding of person–centered thinking skills. We have not developed any plans to do this and not sure how to begin.	
3	We have a plan to develop our understanding of person–centered thinking and some team members have begun to use person–centered thinking skills and approaches. Team members are beginning to attend formal person–centered trainings.	
4	I am using person–centered thinking skills and approaches. All team members know and are successfully using several skills. All team members have one–page profiles and are using them in our work together. Team members understand that it is not just about the skills they use, but the listening and thinking that go with it.	
5	We all have our own one–page profiles and we use these to inform our practice. We are all confident and competent in using person–centered thinking skills and approaches. Team members can describe specific person–centered practices that they use, why and how you can use them, and the benefits to the person. I model enabling people we support to have as much choice and control as possible in their lives. We consistently and proactively use person–centered approaches in all areas.	

How I came up with this score and ideas for what to do next:

Supporting individual development in person–centered thinking skills and approaches

1	The organization has no process in place to reflect on how we work and support staff to develop their skills.	
2	I recognize that all staff need ongoing support and opportunities to build their skills, knowledge, and a means to measure progress. I am not sure how to go about this.	
3	I have started to talk to each team member about how they are doing in using person–centered thinking skills and approaches. This is on an ad hoc basis.	
4	I talk to each team member regularly about how they are developing their skills in using person–centered thinking and approaches, and how I can support them in this I have a record of progress (for example, using the person–centered thinking rating scale).	
5	Each team member has a regularly reviewed personal plan that includes how they are developing their competence in using the person–centered thinking skills and approaches. This includes celebrating successes and problem–solving difficulties. I ensure that each team member reflects on their practice and is accountable. We use a range of ways to ensure each team member has individual support in using person–centered thinking skills and approaches (for example, peer support, coaching, and person–centered practices as a standing agenda item for supervision). There are mechanisms of recording and sharing best practice across the organization.	
	How I came up with this score and ideas for what to do next:	

Supporting team development in person–centered thinking skills and approaches

1	We don't typically meet as a team and when we do meet, we solely focus on processes and procedures.	
2	I recognize that it is important that we meet and reflect about how the team is doing in using person–centered approaches, but we are struggling to prioritize this or find the resources to allow this to happen.	
3	I make sure that we meet regularly, set aside time during team meetings to reflect on practices. Sometimes this includes how we are using person–centered thinking skills and approaches in our work.	
4	I use person–centered thinking skills and approaches in our team meetings. We work together to develop our understanding of person–centered thinking skills and approaches. Reflect on successes and challenges.	
5	We have a strong culture of reflective practice around our experience of using person–centered thinking skills and approaches. We have a variety of ways to support team members to develop their skills in using person–centered practices (for example, as a standing agenda item in team meetings, practice groups to explore a person–centered discovery skill of the month, such as Team 15 resource) The information is collated to inform organizational training and development planning.	

How I came up with this score and ideas for what to do next:

Section 2

Supporting people to have choice and control
Seeing the person as an individual and appreciating culture, strengths, and qualities

✔ Check one box

1	We have information about the person's support needs, which is primarily focused on what is "important for" the person. Staff seem to struggle when asked to describe the person in a positive way and may even feel uncomfortable doing so.	
2	We recognize the importance of seeing the person as a whole person and identifying their culture, strengths and qualities, but we don't usually record or share this.	
3	We are committed to seeing the person as a whole person and to developing ways of gathering a range of information about them in their support plan. This includes recognizing their culture, strengths, and qualities.	
4	We use assessment and discovery skills to collect person–centered information about the person we support. This includes recording the person's culture, strengths, and qualities (for example, in a one–page profile). We do more than just record this information, we use it in ongoing conversations with people to help provide better supports.	
5	We are comfortable describing a person's culture, strengths and qualities and encourage others to do the same. We have found a variety of ways to share this information with the person and those important to them. We use this information to support the person to develop relationships and become a contributing citizen. We see this information as belonging to the person and carried with them through all settings and services.	
	How I came up with this score and ideas for what to do next:	

Understanding the person's history / identity

Check one box

1	We know the person through the Individual's support plan, service provider or personal experience. If we know anything about their history, it is likely in the context of negative behavioral concerns.	
2	We understand that knowing a person's history in a balanced way is important in providing good supports. History that we do know is typically shared verbally, if at all, and we currently do not have a way of recording it.	
3	We have a commitment to finding out about the person's history and have started to work with a few people to talk about their histories and record them.	
4	We have recorded histories for most of the people we support. We have different ways to share this information and are working towards recording histories for everyone we support.	
5	We know and record each person's personal history in as much detail and in the medium that works for them. This is the person's history not the history of provided services. This is recorded in a way that works for the person (for example, on a history map, life story book, multiple identities chart, timeline, scrapbook, memory box, or digital video). We use this information as a foundation for current and future approaches to supporting the person.	

How I came up with this score and ideas for what to do next:

What matters to a person now

✔ Check one box

1 We focus on health and safety, what's important for a person. We do not know or record what is important to a person. We know basic likes and preferred activities, but the information is not reviewed as the person changes.	
2 We understand that what's important to a person needs to be recognized and supported. We are looking for ways to support the person to express what is important to them, and to ensure that these things are consistently present, and that information is recorded.	
3 We have started using some person–centered thinking skills and approaches to gather information about what is important to the person (for example, good day bad day, rituals and routines and the relationships map) This information is helping us change the way we support people.	
4 We have information on what's important to most of the people we support. It is recorded and regularly updated (for example in a one–page profile or a detailed person–centered description). Team members actively use this information to support people.	
5 We know what is important to all the people we support. The information is clearly recorded and contains specific, detailed information, including relationships routines and interests. We make sure this information is regularly updated in a living person–centered plan. We intentionally work to ensure that what's important to a person is happening in their day–to–day life and identify obstacles to achieving this (including where it is the organization's own procedures and practices that cause these obstacles). If obstacles are identified, we have a process of addressing the barrier(s) (for example, within team meetings, individual planning or strategic planning or process improvement within the organization).	
How I came up with this score and ideas for what to do next:	

Working towards outcomes that the person wants for their future

✔ Check one box

1 We provide support based on the person's individual support plan and funding. We are unsure what people want for the future.	
2 We realize that to support people effectively, we should understand their aspirations for the future. However, we are not sure how to do this, or whether it is really our role.	
3 We are trying different person–centered approaches to enable the person to think about their future, and we have recorded goals for some people. We are working on our role in supporting the person to achieve their goals.	
4 We have made good progress in ensuring that everyone we support has an opportunity to think about their future by using person–centered thinking and planning. There are clear outcomes that each person is working towards.	
5 We understand what the person wants for their future– including dreams, hopes and aspirations. We have gathered this information from the person and from those who know and care about them (using person–centered thinking, planning or person–centered reviews). There are specific measurable and achievable outcomes that we are working towards with the person to achieve. We are clear about our role, and we review progress with the person. The information is used to develop a plan and to hold the team and organization to account.	
How I came up with this score and ideas for what to do next:	

How the person wants to be supported

1	We have established policies and procedures for how we provide support. As a result, we support everyone in the same way.	
2	We know that to support people effectively we need to find out how they would like to be supported. We are not clear on how we can do this or how to record the information. Currently, our approach is not flexible enough to allow this to happen. We are task– oriented rather than people–oriented but we want to change this.	
3	We acknowledge the importance of finding out from the person what good support looks like for them individually. We have begun to explore how to do this and have developed a plan to gather this information for each person, using person–centered thinking skills and approaches.	
4	Everyone in the team is clear about what good support looks like for each person. We have started to record this (for example in one–page profiles or an individual support plan). Staff understand what this means for their practice on a day–to day basis and are using this information to inform how they support people.	
5	Each person has told us how they want to be supported, and we act on this. This is clearly recorded, detailed, specific to the person and used by staff to deliver individual support. The information includes the support people want in their routines, in their relationships and interests, and how to help people to be healthy and safe. We review staff performance based on their ability to provide support in the way that the person wants. We received acknowledgment from the person that we are providing support in the right way for them.	
	How I came up with this score and ideas for what to do next:	

How the person communicates

1 We support the person by following our policies and procedures. We do not specifically record how the person communicates.	
2 We realize that we need to understand more about how each person communicates. We are unsure of how we can achieve this.	
3 We have started to capture information about how the person communicates (for example, communication charts, and communication profiles). Staff are beginning to understand that all behavior is communication and that communication is a basic human right. Staffa are developing their skills in observing, recording, and communicating with people.	
4 We have clear information captured about how the person communicated and how best to communicate with them. This applies to the majority of the people we support. Staff have a growing understanding of their own role in effective listening and communication.	
5 We know and respond to how the person communication and how best to communicate with them, particularly if they don't use words to communicate. This is clearly recorded (for example, on communication charts or profiles). Staff know what the person means when they behave in certain ways and how they should respond to this. All staff consistently use this on a day–today basis and update the information regularly.	
How I came up with this score and ideas for what to do next:	

How the person makes decisions

1	The person is not involved in or empowered to make significant decisions about their life.	
2	We realize that the person has the right to be involved and included in any decisions about their life, we also recognize that this could help people feel more in control. We do not know how to support this yet.	
3	We assist the person to become more involved in decision making, both on a day–to–day basis and with more significant decisions. We have introduced different approaches to help the person make decisions if they need additional support (for example, decision making agreements). We involve those who are important in the person's life to support this.	
4	The support we provide centers around the right of the person to make decisions about their life. The use of skills to assist this, such as decision–making agreements, is common and we have many written examples of people making decisions about what is important to them. We are struggling to ensure that this is for all people. Staff support people to record their decisions.	
5	Staff know the decisions that are important to the person, how to support the person with these decisions, how the final decisions is made and who else to involve. This is recorded, for example, in a decision–making agreement. Where needed, we make sure the person gets representation or assistance (for examples, advocacy, interpreters, supported decision–making processes, accessible information, etc.). We assist the person to develop and maintain circles of support. We have supported some people to make decisions that challenged us. We have developed an understanding of how to manage this. The decision–making information we capture links in with our approach to risk.	
	How I came up with this score and ideas for what to do next:	

Acting on what the person is telling us

1 We do not know what is working or not working for the people we support. We only hear about this when a grievance is raised, or formal complaint is made. Complaints are viewed negatively within the team.	
2 We want to learn about what the person thinks is working and not working in their lives. We are not sure how to do this and are fearful we will not be able to respond and make the changes they want. Staff struggle to think about how we will gather this information from people who have complex communication needs.	
3 We have started to routinely ask the person what is working and not working from their perspective. This is about their life and the service they receive, and forms part of our planning process (for example, as part of a person–centered review). We see complaints as a mechanism for learning about what is not working for the person and act on them accordingly.	
4 Staff are confident in supporting the person to tell us what is working and not working regardless of how they communicate. This happens for everyone at least once a year and there is an action plan developed from this. We organize a meeting or review when the person lets us know that changes need to be made. We have created a system that will gather this information so that we can plan improvements in the way we provide support.	
5 We have a process for discovering and recording the things that need to stay the same and what needs to be different from the person's perspective. We have clear actions (with a date and a named person responsible) to change what is not working. The action plan is regularly reviewed, and this information helps to inform change in the organization. We know the person has the right to raise grievances or make complaints, and staff actively support the person to do this when required.	

How I came up with this score and ideas for what to do next:

Supporting the person in their friendships and relationships

1	The only relationships the person has outside of family are paid staff and people who use our service at the same time as them. We don't see it as our responsibility to support the person with relationships, not do we think we are funded to do this.	
2	We realize that the person might want to meet and make more friends. We are fearful this could expose them to harm and risk and we are not prepared to accept responsibility for this. We are not sure how we would begin to find out what relationships are important in the person's life.	
3	We have started to work with the person to consider how we can support them to build and maintain relationships. We are still worried about risk and how to manage this. We have started to understand that we have a role in helping the person to develop circles of support. Staff are putting a greater focus on the person's interests and friendships and how this may link in with their local community.	
4	We have tried a number of approaches to support people with their friendships and relationships. We know who is already important in the person's life (for example, by using a relationship map). The person now has opportunities to meet new people who are not paid to be with them. We are focused on learning how to assist the person to develop and maintain circles of support based on the new friendships they form.	
5	We support the person to form new relationships and friendships in their community (outside of staff and any other people who live with the persons). We know who is important to the person and support them to develop and maintain these relationships. This includes maintaining, reconnecting and discovering their cultural identity. This is recorded (for example, on a relationship circle). We have a strategic approach to friendships and relationships. Staff members see this as a key part of their role.	
	How I came up with this score and ideas for what to do next:	

Supporting the person to be part of their community

1 It is not our job to connect the person in their community.	
2 We think it would be good if the person was out and about in their community more, but we can't see how to do this within our current resources.	
3 We are committed to exploring how the person would like to be part of their community, and we have started thinking about how to do this with a few people. We have tried some skills to help us do this (for example, community maps, recording strengths and qualities, and presence to contribution).	
4 We support the person to go out and be part of their community where possible. We use person–centered thinking skills and approaches to help the person to think about their opportunity and choices, and to help staff to think about their role in the process.	
5 We know the places in the community that are important to the person and other places they may like to be part of. This is recorded (for example, on a community map). We have a specific, measurable plan to enable the person to be fully part of their community, including places of cultural importance, and places to contribute (for examples, through using the presence to contribution skill). This is regularly reviewed and there is evidence that people are becoming part of their community in a way that makes sense to them.	
How I came up with this score and ideas for what to do next:	

Section 3

Create a person–centered culture within teams
Clear purpose

✔ Check one box

1 We have an organizational mission statement created by the senior management and director. We have not considered how the mission statement should be reflected in the way we work.	
2 We think it would be helpful to think about our purpose as a team, but I am not sure how to go about this. Our team mainly functions in isolation.	
3 We have begun to talk with staff about our purpose as a team, and to think about how we can record and share this.	
4 We are clear about our team's purpose and how this fits with the organization's mission statement. The team has developed this together with people supported and their families.	
5 The organization's mission statement informs the team's purpose. Everyone understands the connection between the mission and their individual purpose and role. All team members know their purpose in relation to the people they support, their team and the rest of the organization. This is recorded in a way that the team has decided upon and is shared with others. The team's purpose informs the work of the team, and there is evidence of this in practice.	
How I came up with this score and ideas for what to do next:	

An agreed way of working that reflects values

1	We don't really think about values, we just get on with the job.	
2	We realize that we need to explore our values and beliefs as a team. We know how this can inform our practice.	
3	We have started to think together about our team values and how we work together. We have identified what is working and what we need to change.	
4	We have agreed our team values and developed an action plan that addresses what needs to change. This has been done in partnership with the people we support.	
5	The team has a shared set of values and beliefs that underpin an agreed way of working. Our values include working in ways that ensure the people we support have maximum choice and control in their lives. This is clearly documented (for example, through team agreements, a team charter, a person–centered plan, team procedures, etc.). The team regularly evaluates how they are performing against these agreed ways of working by getting information from different perspectives, including form the people we support.	

How I came up with this score and ideas for what to do next:

Staff know what is important to each other and how to support each other

✔ Check one box

1 My team do not know each other very well and often feel isolated from one another.	
2 I know my staff, but do not necessarily know what is important to them. I have started to work on ways that I can help the team to know more about each other. This includes what matters to them as people, and how we can support each other at work (for example, starting with one–page profiles for everyone).	
3 I am learning what is important to my team and how best to support them by using person–centered thinking skills and approaches with one another. We are all aware of what is important to each team member and how we can support one another, and we are working at putting this into practice.	
4 My team and I have all recorded how best to support each other and what is important to each of us. We have an agreed way to make decisions as a team and know the best ways to communicate effectively with each other. We are starting to explore the different strengths and qualities of each team member, and how we might use them to improve the support we provide.	
5 We know and act on what 'good support' means to each person in the team. This information is recorded (for example, in a person–centered team plan). We regularly reflect on what is working and not working for staff as a team, and what they can do about this. We use person–centered approaches to raise, understand, and resolve tensions and conflict. We have a culture where we appreciate each other's strengths and qualities and use these to support our work wherever we can. We find ways to ensure that staff who work remotely feel connected to one another, as well as to the rest of the team and organization. We actively embrace cultural diversity within the team, and work to understand and honor specific cultural needs and preferences.	
How I came up with this score and ideas for what to do next:	

Staff know what is expected of them

1 I think that each team member has a general sense of what is expected of them.

2 All staff have a generic job description, and work within organizational policies and procedures.

3 I know that staff need to have a better understanding about what their set responsibilities are, and where they can try out ideas and use their own judgement. We have started to have discussions in the team about this.

4 Most staff are clear about what is expected of them and where they can make decisions themselves. There are still some grey areas that we need to explore more. We are using person–centered thinking skills and approaches (for example, the donut) in clarifying expectations and decision making.

5 Staff know what is expected of them. They understand their core responsibilities and where they can try new ideas in their day–to–day work. Staff are clear about their roles in the lives of the people we support. Staff know what they must do in their work with the people they support, with their colleagues, and with any administrative or financial responsibilities. Staff know how to use person–centered thinking skills and approaches to deliver their core responsibilities. They know where they can use their own judgement and try new ideas or approaches, and record what they are learning about what works and does not work when this occurs. Roles and responsibilities are clearly recorded (for example, in a donut) and this is reflected in job descriptions.

How I came up with this score and ideas for what to do next:

Staff feel their opinions matter

1 I make all decisions without involving the team. I chair team meetings and set the agenda. I set the agenda for supervision and personal development planning.	
2 I recognize the need to find a way to listen to my staff team, value their opinions and engage them in decision making. I am trying to improve how I do this.	
3 Staff are able to have some involvement in setting team meeting agendas and contributing their views. I still make most of the decisions.	
4 I regularly meet with my team and discuss issues that they raise (in team meetings and other day–to–day opportunities). They contribute to team meeting agendas and make suggestions for supervision discussions. Some staff make suggestions for new ideas or changes. We are starting to use person–centered thinking skills and approaches to listen to each other (for example, one–page profiles, important to/for, what's working/not working, good day/bad day exercise, 4 plus 1 questions).	
5 Staff feel that their opinions are listened to. Team members are asked for their opinions and consulted on any issues that affect them. Team members feel confident in suggesting new ideas or changes to me. We regularly use person–centered thinking skills and approaches to listen to each other's views and experiences.	
How I came up with this score and ideas for what to do next:	

Staff are thoughtfully matched to people and schedules are personalized to people who are supported

✔ Check one box

1 I write staff schedules based upon staff availability. The schedule meets the requirements of the organization. There is a system for staff and people supported to make requests.	
2 I have identified the preferences of some people supported and the staff (for example, using the matching took and one–page profile). I write the schedules and take these preferences into consideration where possible.	
3 I have a record of the preferences of all people who received a service as well as staff. Some people who are supported are matched to staff with similar interests, but the organization's needs still take priority.	
4 My team and I know what people's preferences are. These preferences are acknowledged in the way that the roster is developed, structured and shift times reflect how people want to be supported.	
5 Decisions about schedules are based on who the person wants to support them. If I need to make this decision, it is based on which staff are best matched to the person, taking into account common interests as well as personality characteristics, necessary skills and experience. Rosters and schedules are developed around the support the person wants, the activities they want to do and who they want to support them. Attention is given to the specific cultural needs of both the person and individual staff members when looking at schedules, schedules and planning leave throughout the year.	
How I came up with this score and ideas for what to do next:	

Recruitment and selection

1	Staff are recruited based on formal job descriptions that have been developed by the organization.	
2	I know I should involve the people who receive a service in recruitment, but I am not sure how to go about this.	
3	I have started to look at "good practice" examples of ways to involve people supported in recruiting their staff. We have started to explore how we can develop job descriptions that reflect what is important to people we support.	
4	We have worked with people supported and identified ways for them and their families to be involved in the recruitment and selection of their staff. This happens some of the time. We have developed personalized job description and advertisements. We use person–centered skills and approaches (for example, the matching skill and values–based recruitment) in our recruitment processes.	
5	Our recruitment and selection process demonstrates a person–centered approach. We recruit people who can deliver our purpose and are well matched to the people supported. We select people based on their values, beliefs, and characteristics, not just their experience and knowledge. Job descriptions and advertisements are individualized to the person supported wherever possible. It is standard practice for people supported to be involved in recruiting their own staff, in a way that works for them.	
	How I came up with this score and ideas for what to do next:	

Enabling risk

1 I encourage my team to make sure people are safe and do not take risks. We adhere to all required legislation. We don't talk about rights–based approaches to risk.	
2 I am aware that I need to encourage my team to understand and practice rights based approached to risk and become less risk averse. I am not sure how to do this.	
3 I am working with the team to help them take a responsive and person–centered approach to risk. We are starting to use this in some situations.	
4 We use person–centered approach to risk most of the time. Staff have a clear understanding of this approach through training and support. We involve the person, their family and others in thinking through risks and we link this in with decision–making information.	
5 We recognize people have the right to make decisions and choices and that some choices involve risks. We support a person's right to choose by taking steps to ensure risks are thought through in a person–centered way that reflects what is important to the person. The person and, where appropriate, their family are centrally involved in the way that we do this. Decisions are clearly recorded.	
How I came up with this score and ideas for what to do next:	

Training and professional development

1	All training is based on legislative requirements, I make sure that we meet the minimum legal and funding requirements.	
2	I recognize that I need to find training and professional development opportunities for my team that reflect the needs and rights of the people supported and will motivate the staff. All staff are required to complete orientation training. This is centered on compliance and safe working practices.	
3	I have started to think about how I can introduce learning and professional development opportunities to staff that will reflect the needs and wishes of people supported and engage and develop the team member. I have begun to look at what is working and what is not working for staff along with what is available.	
4	We have prioritized training needs and identified professional development opportunities which are aligned with each team member's personal development plan. Training and professional development reflect the needs and wishes of people who receive a service and have been agreed to with team members. Person–centered thinking and approaches are central to our approaches to training. We comply with all legal and funding requirements.	
5	We provide professional development and training opportunities to all staff which reflect the goals identified through their personal development plan. Opportunities focus on increasing choice and control for people supported and delivering person–centered support. New staff, within the first few months of hire, have completed an orientation training that includes using person–centered thinking and approaches to deliver our purpose. Training content and materials are reviewed to be up–to–date and consistent with best practices.	
	How I came up with this score and ideas for what to do next:	

Supervision

1 We struggle to find time for regular supervision, which is seen negatively by some staff. We do not have ways to conduct supervision with staff who work remotely. I set the agenda and make the arrangements for staff supervision if and when it does occur.	
2 Supervision is conducted in an ad hoc manner and has no connection to the personal development plan. I am aware that staff support, and supervision practices need to be reviewed but I am not sure how I can change the current arrangements.	
3 I have started to think about involving people who receive a service and families in staff supervision and have spoken to people and staff about how we may go about this. Most members of staff have supervision meetings.	
4 All staff have regular supervision and people supported and/or families usually contribute through sharing their views with me before the supervision session. Supervision is seen as a positive experience, not just about things that need improving, and resulting actions are documented. I have started to use person–centered thinking skills and approaches in supervision sessions.	
5 Each team member, including remote staff, has regular, planned, individual supervision. Supervision includes giving staff feedback on what they do well, as well as what they can improve on (i.e. coaching staff to develop their skills in working in a person–centered way). There is a clear link between training and supervision and what people do when they are at work (for example, when staff attend training, I expect to see a difference in their work and this is discussed in their individual supervision). The views of people supported and families are very important in the supervision process, and people are asked to provide feedback before supervision. Supervision is clearly linked to and builds on personal development plans.	
How I came up with this score and ideas for what to do next:	

Performance planning, support and development

✓ Check one box

1	None or very few of my staff have a personal development plan. I set the agenda and assign objectives if and when it does occur.	
2	Organizational policies specify that all staff have a personal development plan but in practice this is not occurring consistently. Staff who do have a personal development plan generally do not contribute to the agenda or development of goals. There is minimal reference to the personal development plan from the previous year. I understand that people who receive a service should be given the opportunity to provide feedback on the support they receive from staff. I am not sure how I should go about this.	
3	I have a strategy in place to ensure that each staff member has a personal development plan. These plans are sometimes reviewed through supervision throughout the year, but not consistently. I have started to talk to each team member about human rights and how they are using person–centered thinking skills and approaches in their work. Where possible, I seek the views of people supported and their families to inform progress.	
4	All staff have a personal development plan. Staff are asked to reflect on what they have tried, learned, are pleased about and if they have any concerns. We then agree on what actions need to be taken from all the information gathered. We have a variety of ways for people who receive a service and their families to contribute their views to staff performance planning and support discussions.	
5	Each staff member has a personal development plan that includes feedback from people being supported and their families about what is working and not working. Personal development plans outline clear goals and actions that build on strengths, focus on working in a person–centered way, and further develop skills. We have agreed on how we will know when the goals have been achieved. Positive feedback is seen as an essential aspect of this process. Actions and goals are reviewed at regular supervision meetings throughout the year.	

How I came up with this score and ideas for what to do next:

Meetings

1	We have occasional team meetings but not everyone attends or contributes	
2	There are frequent team meetings. I set the agenda and chair the meeting. There is little structure to the meeting and they are not as well attended as they could be.	
3	I schedule regular team meetings. The meeting tends to focus on the provision of information and does not often include problem solving or celebrating successes.	
4	We have regular structure team meetings which are documented. Actions are decided on as a group, recorded and followed up on. They are well–attended, and most people contribute.	
5	Our team has regular, productive team meetings that everyone can contribute to. Team meetings include sharing what is going well and problem–solving difficulties (for example, using person–centered skills to solve problems).	
	How I came up with this score and ideas for what to do next:	

Section 4

Actions and resources

On the following pages we have included an action plan where you can use your scores from each section of Progress for Providers to plan your next steps. Look at each section and reflect on what the next statement suggests you may want to work towards. Use the action plan in this section to record what you are going to do to achieve this, who will be responsible for this, and when you want this to be achieved.

The action plan is followed by an explanation of terms, a guide to person centered thinking tools, and a crosswalk of Home and Community Based Services (HCBS) settings regulations with suggested person–centered approaches that can be helpful.

Section	What do we want to work towards? (the next statement)
Section 1 **Person-centered thinking skills and approach** Knowledge, skills, and understanding	
Supporting individual development in person-centered thinking skills and approaches	
Supporting team development in person-centered thinking skills and approaches	
Section 2 **Supporting people to have choice and control** Seeing the person as an individual and appreciating culture, strengths, and qualities	
Understanding the person's history / identity	
What matters to a person now	
Working towards outcomes that the person wants for their future	
How the person wants to be supported	
How the person communicates	
How the person makes decisions	
Acting on what the person is telling us	
Supporting the person in their friendships and relationships	
Supporting the person to be part of their community	
Section 3 **Create a person-centered culture within teams** Clear purpose	
An agreed way of working that reflects values	
Staff know what is important to each other and how to support each other	
Staff know what is expected of them	
Staff feel their opinions matter	
Staff are thoughtfully matched to people and rosters and are personalized to people who are supported	
Recruitment and selection	
Enabling risk	
Training and professional development	
Supervision	
Performance planning, support and development	
Meetings	

What are we going to do? (actions)	By when?	How will we know this has been achieved?
What are we going to do? (actions)	By when?	How will we know this has been achieved?

Detailed action plan

First priority

Why is this your first priority?

First steps

Who   By when

Who else needs to know/help this to happen?

How will I get their help?

What support will I/we need?

From inside the organisation

From outside the organisation

How will I know I have been successful?

What will have changed? What will you see? What will you feel? What will you hear?

Detailed action plan

Next priority

Why is this your next priority?

First steps

Who   By when

Who else needs to know/help this to happen?

How will I get their help?

What support will I/we need?

From inside the organisation

From outside the organisation

How will I know I have been successful?

What will have changed? What will you see? What will you feel? What will you hear?

Detailed action plan

Next priority

Why is this your next priority?

First steps

Who   By when

Who else needs to know/help this to happen?

How will I get their help?

What support will I/we need?

From inside the organisation

From outside the organisation

How will I know I have been successful?

What will have changed? What will you see? What will you feel? What will you hear?

Detailed action plan

First priority

Why is this your first priority?

First steps

Who   By when

Who else needs to know/help this to happen?

How will I get their help?

What support will I/we need?

From inside the organisation

From outside the organisation

How will I know I have been successful?

What will have changed? What will you see? What will you feel? What will you hear?

Explanation of terms
Action Plan

The action plan section of an individual or team plan clearly states what people are going to do to "make things happen". Action plans often contain a breakdown of who is responsible for what in relation to an individual's goal or, in the case of team planning, the goals of the team. In some cases, actions may simply be related to things that need to happen in order to change what is not working for someone.

'Good practice' action plans should:

- State what needs to be done in a clear enough manner that someone not involved in the planning could read it and know what is happening/what needs to be done.

- Ensure that large goals (for example, overseas travel or moving into a house) are broken down into smaller components.

- Have a clear completion date and avoid vague statements such as 'ongoing'.

- Specifically state the named person responsible (both their name and role), or who is taking the lead. Statements such as 'all staff' can result in situations where in fact, rather than all staff taking responsibility, no one does.

Appreciation Books

Books dedicated to recording what people appreciate or like and admire about someone. These can be for people receiving support, for their families, or for staff members. An appreciation book can be as simple as a blank notebook or journal with a heading and photo of the person. They can be made using a variety of creative mediums; for example, scrapbooking, patchwork, DVD, or collage. There are no set rules for how to develop appreciation books or what they should look like. They are simply a way to record and celebrate great things about the person.

Coaching

Coaching uses a process of inquiry and discovery to build an individual's awareness and responsibility, and provides them with structure, support and feedback to further develop skills and achieve goals.

Communication Chart

The communication chart is a simple, but effective way to capture how someone communicates through his or her behavior. Capturing how someone communicates, and using this information, can help to relieve some of the frustration felt by the person due to being misunderstood. It also makes it easier for new people in the person's life to get to know and understand them. Communication charts usually capture information about what the person says or does, what we think it means and how people should respond to the communication. They also let people know if what the person is communicating means something different depending on the environment or time of day.

Communication Profile

A one- or two-page snapshot that covers important information about preferred communication methods, the best way to communicate with the person, and any other key information for successful communication. This is a simple, easy-to-read document that allows new people (staff or members of the community) to make a positive start to communicating with the person without having to read detailed files or speech pathology reports. Communication profiles are helpful when the person does not use words to communicate, when speech is unclear, or when the person's communication can be ambiguous. Rather than using standardized headings, communication profiles should only capture information relevant to the person and should be free of jargon or technical language.

Circles of Support

A group of people who come together with the intention of providing support to an individual or family to work towards their goals. Members of an individual's circle of support are usually involved in a volunteer capacity and may offer input in a particular area or expertise, take on actions or simply provide another perspective. Recent work on Community Circles has begun to explore the notions of paid versus voluntary involvement in an attempt to make circles available to more people.

www.communitycircles.gomocentral.com

Helen Sanderson Associates USA is eager to collaborate with others interested in developing Community Circles in the United States.

Community Map

Supports people to capture what is happening in the person's local community – places, people and things to do. When thinking about community connecting and supporting people with opportunities, it is often helpful for people to first gain a thorough understanding of what is actually available in their area.

Complaint

A complaint (also known as grievance) is when someone you support lets you know that they are not happy about something that has or hasn't been done. It could be about something a staff member has personally done or not done, or something about your service. Complaints can be made in words, writing or using alternative communication.

Decision-Making Agreement / Profile

Decision-making agreements and decision-making profiles look at what support someone needs to make decisions in their life and ensures that they have as much power and control as possible in how these decisions are made. These skills are not about discerning whether or not someone has the capacity to make decisions. Rather, the focus is on how the person must be involved in decision making, who makes the final decision, and what conditions are needed to ensure that the person is in the best position to make decisions.

Dimensions of Diversity

A framework for understanding cultural identity that includes gender, religious beliefs, race, marital status, ethnicity, parental status, age, education, physical and mental ability, income, sexual orientation, occupation, language, geographic location, and many more components.

Donut (Doughnut)

The donut was originally developed by Charles Handy in The Empty Raincoat (1994).

The donut is a skill that helps staff to get clear about their roles and responsibilities. This skill helps people to see what they must do, where they can try new things or use their own creativity and judgement, and what is not their responsibility. Developing a donut is often useful when staff members are unclear about their responsibilities when supporting someone in a particular situation, or when people are concerned about a risky situation. The donut skill should encourage staff to use their initiative and 'think outside the box' without being worried that they will get into trouble if they get it wrong. The donut should help to get a better balance of what's important to and important for the person, even if the skill is being used to gain clarity about a situation regarding health and safety.

Good Day / Bad Day

A person–centered thinking skill that uses simple information about the things that make either a good day or bad day for a person. This information helps others to learn more about what is important to someone and how they want to be supported. Using this skill can also help the person and those around them to think differently about how they may want to spend their used with teams as part of developing staff one–page profiles or a person–centered team plan.

Human Rights

Human rights are universal legal guarantees protecting individuals and groups against actions that interfere with fundamental freedoms and human dignity.

Human Rights Principles

There are four important general principles of human rights. They can be remembered by the acronym FRED.

- Freedom – We all have the right to be free. Like all of us, people with disabilities have the right to own their own things (home, clothes, etc), the right to freedom, the right to choice of work and the right to be safe.

- Respect – We all have the right to be treated with respect. Like all of us, people with disability have the right to be respected. People have the right to have their choices respected and to have their family, culture and religious beliefs respected.

- Equality – We all have the right to be treated equally. Like all of us, people with disabilities have the right not to be discriminated against, including on the basis of their disability, or treated unfairly. People with disability have the right to the same opportunities to make choices that we would all ordinarily expect. They have the right to participate in their community and access the same facilities and services as others.

- Dignity – We all have the right to be treated with dignity. A person must not be physically or mentally abused or neglected, or subjected to cruel, inhuman or degrading treatment. It is important that people with disabilities are treated with dignity when provided with personal care and other disability services.

History Map

A skill that provides a simple way to record and share information about an individual's past. This skill can be used to record as much or as little of the person's past as they want to share and can help others to get to know and understand the person better. Exploring things that someone has done in the past can also help to generate new ideas about what the person might want to do again, or things that they want to avoid.

See also: Recording Histories

Important To / Important For

The first and most fundamental person–centered thinking skill is to be able to learn what is important to someone, what is important for them, and how to achieve a balance between the two. This is a principle that underpins the achievement of person–centered change.

What is important to a person is what they say through their own words and behaviors about what really matters to them. What is important for people are the things that help people to become or stay healthy and safe, or to be valued members of their community.

The balance between the two is the trade–offs that all of us experience in life: the balance between wanting to eat chocolate and wanting to maintain our weight, or between wanting lazy evenings and wanting to get fitter at the gym. We all need to find a balance so that our lives are not just about staying healthy and safe and doing things for others, nor simply doing whatever we want without regard for the consequences.

Induction Training

Training (also known as orientation or on–boarding) provided to new employees to induct them into the organization. Induction training usually covers basic information that staff need to perform their roles, as well as key information about the culture and values of the organization.

Matching Skill

If we are to improve the quality of people's lives, one of the most powerful things we can do is to get a good match between staff and the people they support.

This skill helps us to think about the activities/interests in the person's life and to look at matching staff according to personality, shared interests and skills, so that people enjoy the time they spend together. The matching skill makes a distinction between skills that can be taught versus characteristics that are inherent to the person and cannot be developed through training.

One-page Profile

One-page profiles, also known as one-page descriptions or one-page introductions, capture what people like and admire about a person, what is important to them, and what others need to know and do to support them. They are a great way of giving new people crucial information, enabling them to understand what they need to know without having to take a long time. They are especially helpful when there are new or temporary staff that may never have met the person before and may not meet them again. One-page profiles are also a way of ensuring that important information is captured and shared, so that we don't just rely on what is passed on verbally.

Person-centered Approaches

Ways of working where the central focus and the subsequent work is on the person as an individual. This could be a strategy or method of working, but the key aspect is that the individual and not the organization or system is at the centre.

Person-centered Thinking©

A set of practical, yet values-based skills and skills that have been developed over time that:

- Help to find ways to support the person rather seeing the person as broken and needing to be 'fixed';

- Work for humans;

- Work at every level of the organization;

- Help to build organizational cultures of learning and accountability.

Person-centered thinking skills were developed by The Learning Community for Person Centred Practices and are used in several countries around world within the areas of disability, aging, mental health, and chronic health conditions.

tlcpcp.com

Person-centered Thinking© Rating Scale

A scale developed to support staff to reflect on their use of person-centered thinking skills. It names some of the main skills and skills that staff might use alongside individuals, and asks them to score themselves on their use, sense of confidence and competence. The purpose of the rating scale is to encourage staff to reflect on their skills so that they can set actions to work on areas that they are not confident in, or to seek help from others. The rating scale can help to take the use of person-centered thinking skills and approaches from occasional use to habit.

Person-centered Review

A way of facilitating planning meetings and reviewing plans, using some of the person-centered thinking skills. The information gathered in a person-centered review leads to actions and can be used to develop a living description and a one-page profile. The person-centered review process is a way of making sure that there is a person-centered approach to planning with individuals, even when there are time constraints or when the planning is only happening because the service requires it.

Person-centered Risk

A person-centered approach focuses on a person's right to have the lifestyle that they choose, including the right to make 'bad' decisions. The approach described here uses person-centered thinking skills to help the person and those who care about them to think in a positive and productive way about how to support them to achieve the changes they want to see, while keeping the issue of risk in its place.

This, in essence, is a process to gather – in partnership with the person – the fullest information and evidence to demonstrate that those involved have thought deeply about all relevant issues. Decisions are then guided by what is important to the person, what is needed to keep them healthy and safe, and what is required by law.

Person-centered Supervision

A process that creates a respectful and supportive environment so that supervision is positive and productive for those involved.

The process includes practical strategies and skills that promote listening and creative thinking, building on people's strengths so that individuals come away from supervision feeling understood, supported and motivated, with a clear direction for action.

See also: Supervision

Person-centered Team Plan

Person-centered team plans utilize person-centered thinking skills with staff to explore and answer the following;

- Why are we here?
- Who are you and how can we work together?
- What are we here to do?
- Who is going to do what, when and where?
- How well are we doing?
- What else can we try?
- How can we record and share what we are learning?

Personal Development Plan

A personal development plan (also known as an appraisal or performance appraisal), is a plan developed with individual staff members that may include the following elements:

- New skills they want to learn to help them do their jobs better

- Areas of work where they need further learning

- Future aspirations for their career

- An action plan and goal setting

Personal development plans are often conducted annually and may form the basis for an individual's supervision and/or professional development.

Presence to Contribution

A skill that is helpful when thinking with people about what they do on a day-to-day basis, and the opportunities that these activities present for getting involved, meeting new people, making connections and contributing to the community.

Progress for providers – Checking your progress in delivering personalized services

A self-assessment checklist developed for senior managers and leaders of any service to check their organization's progress in responding to personalization.

Recording Histories

When we talk about recording an individual's history using a person-centered approach, it means having some information about the person's past that is captured in a way that makes sense to them. For some people, it may be a history map; for others, it may be a box of important objects related to their past that they like to share, or a photo board of important people and places. When histories have been recorded in a person-centered way, they will have a storytelling feel to them, rather than feeling like a list of services, incidents and reports. Recording histories should be led by the person without censorship, so there may be sad or negative elements included.

Recorded histories can act as a safeguard against the person losing contact with those who are or have been important to them and should generally ensure that crucial information is not lost. This is particularly important if the person does not use words to communicate, or has difficulty communicating.

Relationship Map/Circle

The relationship map records who is in a person's life. It can be used to help services discover who is important in someone's life and support the person to reflect on who they might want to involve in planning meetings. A relationship map can also be used to help people to identify where existing relationships may be strengthened, maintained or renewed, especially where they are reliant on others to make contact with people.

Representation/Representative

A representative is someone who speaks for or acts on behalf of someone else, typically with an advocacy role.

Rights-based Approach

A human rights-based approach involves a consideration both of what you are going to do based on the principles of human rights, and of how you are going to do your work in ways that promote these rights. The human rights of the person should always be considered and be part of any process or decision-making.

See also: Human Rights Principles

Supervision

Supervision (also known as one-to-one time, job consultation, reflective practice, or giving effective feedback) provides staff members a period of planned, structured one-to-one time with their managers – or, in some instances, with an external supervisor. Supervision is an opportunity to provide feedback and support, as well as ensuring that the staff member is carrying out the responsibilities that are part of their job. While supervision is most commonly carried out face-to-face, if staff work in remote locations, phone meetings or video conferencing may also be used. Importantly, ad hoc 'catch-ups' are not an effective substitute for planned, structured supervision. Supervision may form part of an individual's professional development.

Support Plan

A plan that describes what is important to an individual now and in the future, and the support they need from others in order to achieve these things. Support plans also have clear actions attached that clearly state what the person, service providers and others will do. Support plans can help individuals to think about how to spend hours/funding and can have a budget allocation attached to them.

Supported Decision Making

A process of supporting someone to make decisions, particularly when they possess severe/profound intellectual disabilities or other significant cognitive impairments.

Team Charter / Plan

A document developed collaboratively that clarifies team direction and purpose and helps to create focus within the team. Team charters often include information on the goals and expectations of team members.

What's Working / What's Not Working

A person-centered thinking skill that supports action planning based on the current reality and captures information from different perspectives. Using this particular skill can help people to reflect on the current reality and also ensure that people feel listened to.

'What's working / what's not working' is a person-centered thinking skill that can be used at all levels of an organization, particularly in situations where action planning is intended, and different perspectives/points of view need to be captured and considered.

  4 plus 1 questions

  1. What have we tried?

  2. What have we learned?

  3. What are we pleased about?

  4. What are we concerned about?
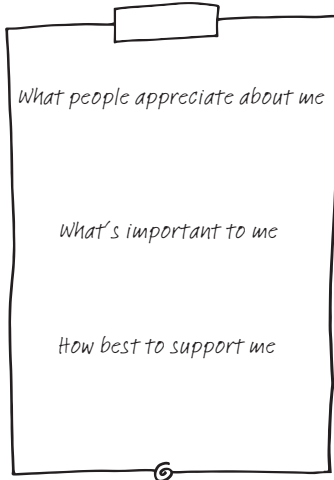
  + 1: Given what we know now, what next?

These questions help people to pause and reflect before moving to action and provide a structured way to ensure that previous efforts and learning are not lost. The structure also helps people to keep focused on moving forward, rather than becoming stuck on the 'issue'. This skill can help with developing plans or tracking the implementation of plans, in either an individual or team context.

Person-centered thinking tool	What it does	How this person-centered thinking tool helps
One-page profile (sorting important to/for) What people appreciate about me What's important to me How best to support me	• Separates what is important TO someone (what makes the person happy, content and increases well being), from what is important FOR them (the help or support they need to stay healthy, safe and well) while working towards a balance between the two.	• Identifies what must be present, or absent, in the person's life to ensure they are supported in ways that make sense to them, whilst staying healthy and safe. • A quick summary of who the person is and how to support them for all staff and others. • The basis for making changes using a one-page profile with working/not working.
Appreciations What we appreciate about	• Identifies the qualities that people value and admire about the person. • Helps supporters to see what makes the person unique.	• Acknowledges and appreciates a person's gifts and qualities. • Ensures we see people for who they are and counters the frequent focus on what is wrong. • Identifies those who have a personal connection with the person and those who really know what is important to them. • Part of a one-page profile.
Relationship circle Family Health Professionals People paid to support me Friends	• Identifies who the important people are in a person's life.	• Shows who is most important to the person. • Sees if there are any important issues around relationships. • Helps identify who to talk to when gathering information. • Identifies relationships that can be strengthened or supported.
Life story/history Born School Jobs New home Family NOW	• Our histories make us who we are – with history comes regard. • Gives people the opportunity to understand and appreciate the person in the context of their own story.	• Shows us how best to support the person in the context of their past life which may represent current reality. • Can be used to frame meaningful conversations. • Helps supporters empathise with the person and see their role as ensuring a good quality of life for them.
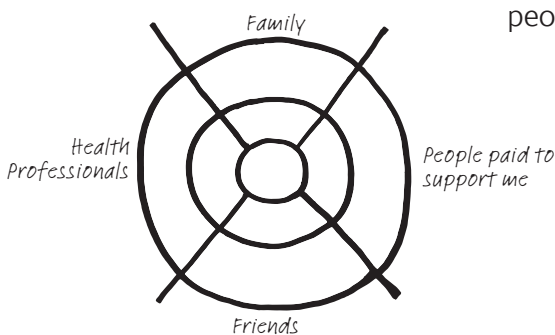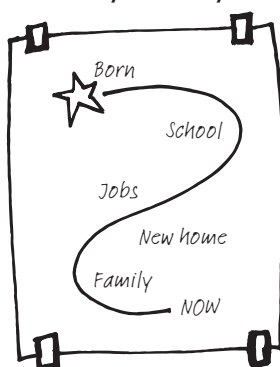
Person–centered thinking tool	What it does	How this person–centered thinking tool helps
Communication charts	• A quick snapshot of how someone communicates. • Important whenever what the person does, communicates more clearly than what they say.	• Helps us focus on people's communication whether they use words to speak or not. • Provides clear information about how to respond to the way the person communicates.
Working/not working	• Analyses an issue or situation across different perspectives. • Provides a picture of how things are right now, and how this compares with the way people want to live and be supported. • Enables us to reflect on what is actually happening in someone's life and to change what needs to be changed.	• Clarifies what to build on (maintain or enhance) and what to change. • Helps in looking at how; any part of a person's life is working, people providing paid support are doing in their work, any effort, activity or project is working. • Helps with mediation where there are disagreements. • Use to create actions from a one–page profile.
Good days and bad days	• Explores in detail what makes a good day for a person (i.e. what needs to be present in their daily life) and what makes a bad day (i.e. what needs to be absent).	• Helps the person have more good days and less bad days. • Helps us learn about what is important to someone and how they want to be supported. • Offers another way to gather information for a person's Communication chart, Relationship circle, and Matching support.

| Person–centered thinking tool	What it does	How this person–centered thinking tool helps
Learning log	• Directs people to look for ongoing learning through recording specific activities and experiences.	• Provides a way for people to record ongoing learning (focused on what worked well and what didn't work well) for any event or activity. • Tells us what is important to and for individuals and families. • Can replace traditional notes or records to help us see the importance of moving away from focusing on getting tasks done, to truly supporting people to have a good life based on our continual listening and learning. • Can be used to focus on someone's whole life or specific areas of their life, e.g. someone's health, how people like to spend their time.

Date	What did the person do?	Who was there?	What did you learn about what worked well?	What did you learn about what didn't work?

Person–centered thinking tool	What it does	How this person–centered thinking tool helps
Matching staff	• Provides a structure to look at what skills, supports, people characteristics and shared interests make for good matches.	• Encourages the person, and those around them, to think about what kind of paid support they want and need when recruiting team members. • Ensures the person likes the people who are supporting them, making it more likely they will have a good quality of life.

Skills needed

Support needed and wanted

Personality characteristics needed

Shared common interests
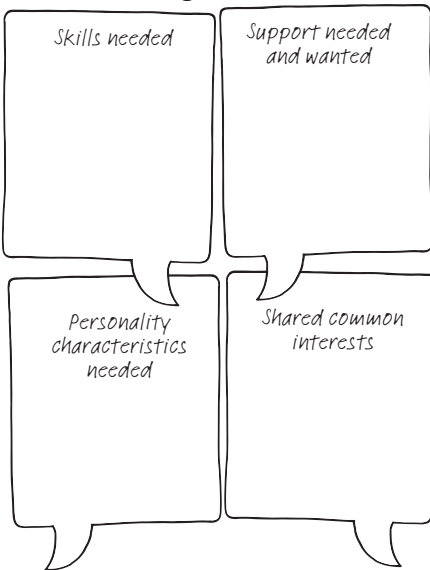
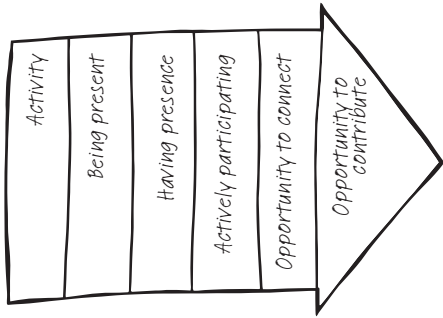| Person–centered thinking tool	What it does	How this person–centered thinking tool helps
4 plus 1 questions	• Helps people focus on what they are learning from their efforts. • Given this learning, what needs to happen next?	• Gives a structured way for everyone to be listened to and describe what they have learned. • Useful in review meetings and individual work with families. • To review actions from plans and plan further actions.

1. What have we tried?

2. What have we learned?

3. What are we pleased about?

4. What are we concerned about?

5. Given what we know now, what next?

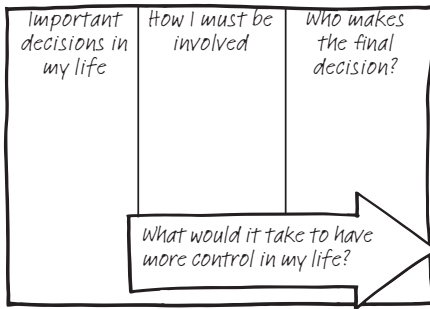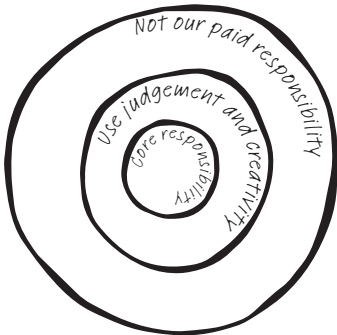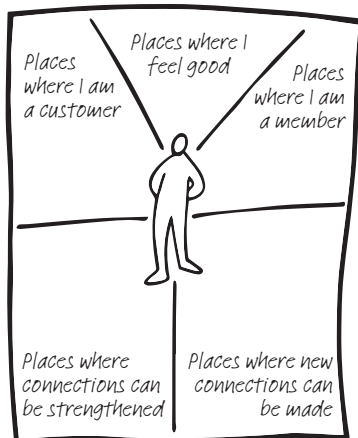| Person–centered thinking tool	What it does	How this person–centered thinking tool helps
Presence to contribution	• Encourages creative thinking about activities and how we can use them as opportunities for participation and contribution. • Identifies activities that the person is already, or wishes to be, involved in.	• Promotes being included, leading life to the full, doing interesting things and making a contribution as a full member of the community.
Decision making agreement	• Helps us to think about decision making and increasing the number and significance of decisions people make.	• Enables people to be in control and to make decisions. • Can inform best interest decision making and advanced decision making.
Donut sort	• Clarifies the roles and responsibilities of the different professionals and agencies supporting people and their families.	• Helps staff to be clear about what they must do and where they can be creative when supporting people to live at home.
My places	• Helps to identify the places that matter in a person's life.	• Increases understanding and helps identify places that are worth paying more attention to; it also helps develop the community map and perfect week.

Presence to contribution diagram labels: Activity, Being present, Having presence, Actively participating, Opportunity to connect, Opportunity to contribute

Decision making agreement diagram labels: Important decisions in my life, How I must be involved, Who makes the final decision?, What would it take to have more control in my life?

Donut sort diagram labels: Not our paid responsibility, Use judgement and creativity, Core responsibility

My places diagram labels: Places where I feel good, Places where I am a customer, Places where I am a member, Places where connections can be strengthened, Places where new connections can be made

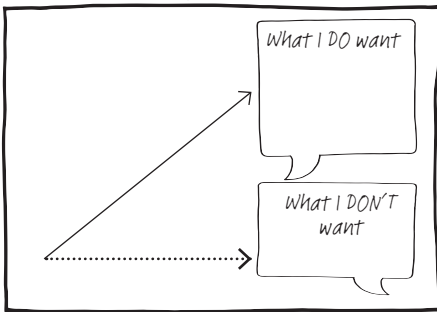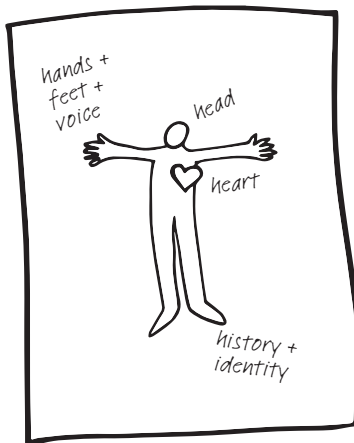| Person–centered thinking tool	What it does	How this person–centered thinking tool helps
Perfect week *Mornings / Afternoons / Evenings* *Mon, Tues, Wed, Thurs, Fri, Sat, Sun*	• Provides a detailed description of how a person wants to live, not an unrealistic dream. It includes the important places, interests and people that matter to a person.	• Align Perfect Week with Matching support to work out the best people to support the person to deliver the perfect week. • Helps you look at best ways to support by thinking about family, friends, community initiatives, assistive technology and paid support. • Serves as an evaluation tool for teams to see how well they are delivering personalized support and achieving the right outcomes for the person.
LifeCourse Trajectory (visioning tool) *What I DO want* *What I DON'T want*	• Creates a vision of the future a person DOES want as well as the future the person DOES NOT want. • Learn more about Charting the LifeCourse at lifecoursetools.com	• Helps a person and their family to think about the future • Encourages people to reflect on past experiences and decisions that may have helped or hindered progress toward the life the person DOES want • Looks at different domains of living and various stages in life to reflect on age–appropriate activities and resources.
Gifts and capacities *hands + feet + voice* *head* *heart* *history + identity*	• Explores gifts and capacities and what a person has to contribute.	• Encourages us to think about situations where the person can best make a contribution.

Person–centered approaches can help service providers meet Home and Community Based Services (HCBS) requirements

Federal Requirements for HCBS	Person–Centered Tools that support providers in meeting and documenting this requirement
For 1915(c) home and community–based waivers and, for 1915(i) State plan home and community–based services, home and community–based settings muas have all of the following quality requirements in place:	

Quality Requirement #1
The setting is integrated in and supports 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.

- Gifts and Capacities
- Community Mapping
- What happens here
- Presence to Contribution
- Important to / Important for
- Other discovery tools

Quality Requirement #2
The setting is selected by the individual from among setting options, including non–disability specific settings and an option for a private unit in a residential setting. The setting options are identified and documented in the person–centered service plan and are based on the individual's needs, preferences, and, for residential settings, resources available for room and board.

- Important to / Important for
- Matching
- Routines & Rituals
- Good Day / Bad Day
- Working / Not Working
- Decision making profile
- Decision making agreement

Quality Requirement #3
Ensures an individual's rights of privacy, dignity and respect, and freedom from coercion and restraint.

- Important to / Important for
- Communication Charts
- Decision making profile
- Decision making agreement

Quality Requirement #4
Optimizes but does not regiment individual initiative, autonomy, and independence in making life choices, including but not limited to, daily activities, physical environment, and with whom to interact.
"The individual will lead the person–centered planning process where possible. The individual's representative should have a participatory role"[1]

- Important to / Important for
- One Page Profile
- Matching
- Routines & Rituals
- Good Day / Bad Day
- Working / Not Working
- Decision making profile
- Decision making agreement

Quality Requirement #5
Facilitates individual choice regarding services and supports, and who provides them.
"Reflects cultural considerations of the individual"
"Includes strategies for solving conflict or disagreement"
"The person–centered service plan must reflect the services and supports that are important for the individual to meet the needs identified through an assessment of functional need, as well as what is important to the individual"[1]

- Decision making profile
- Decision making agreement
- Matching
- Important to / Important for
- One Page Profile

[1] Federal register/Vol 79 No.11 pg. 3029 & 3030 Sec441.301

Federal Requirements for HCBS In a provider–owned or controlled residential setting, in addition to the qualities specified on the previous page, the following conditions must be met:	Person–Centered Tools that support providers in meeting and documenting this requirement
Settings Requirement #1 The unit or dwelling is a specific physical place that can be owned, rented or occupied under a legally enforceable agreement by the individual receiving services, and the individual has, at a minimum, the same responsibilities and protections from eviction that tenants have under the landlord/tenant law of the State, county, city or other designated entity.	• Working / Not Working • Met by local review of agreements
Settings Requirement #2 Each individual has privacy in his/her sleeping or living unit: 1. Units have entrance doors lockable by the individual, with only appropriate staff having keys to doors as needed. 2. Individuals sharing units have a choice of roommates in that setting. Individuals have the freedom to furnish and decorate their sleeping or living units within the lease or other agreement.	• Decision making profile • Decision making agreement • Matching • Important to / Important for • Relationship map
Settings Requirement #3 Individuals have the freedom and support to control their own schedules and activities, and have access to food at any time.	• Important to / Important for • One Page Profile • Matching • Routines & Rituals • Good Day / Bad Day • Working / Not Working • Decision making profile • Decision making agreement
Settings Requirement #4 Individuals are able to have visitors of their choosing at any time.	• Important to / Important for • Relationship map • Matching • Routines & Rituals • Good Day / Bad Day • Working / Not Working • Decision making profile • Decision making agreement
Settings Requirement #5 The setting is physically accessible to the individual.	• Working / Not Working • Important to / Important for
Settings Requirement #6 Any modification of the conditions specified in items 1 through 4 above, must be supported by a specific assessed need and justified in the person–centered service plan: Identify a specific and individualized assessed need / Document the positive interventions and supports used prior to any modifications to the person–centered service plan / Document less intrusive methods of meeting the need that have been tried but did not work / Include a clear description of the condition that is directly proportionate to the specific assessed need / Include regular collection and review of data to measure the ongoing effectiveness of the modification / Include established time limits for periodic reviews to determine if the modification is still necessary or can be terminated / Include the informed consent of the individual / Include an assurance that interventions and supports will cause no harm to the individual.	• Important to/Important for • Working / Not Working • Person Centered Description • Person Centered Review • Person Centered Risk • 4+1 • Learning Log

Section

Section 1

The knowledge, skills and understanding about person-centered thinking skills and approaches

Section 2

Using person–centered thinking skills and approaches to support individuals to have choice and control in their lives

Section 3

Using person-centered thinking skills and approaches to create a person-centered culture within the teams

Web resources

Michael Smull. A series of films on each person–centered thinking skill
www.youtube.com/user/helensandersonHSA

Think and Plan – a free website for people to use person–centered thinking online www.thinkandplan.com

Mary Beth Lepkowsky. A series of films on person–centered coaching www.youtube.com/user/helensandersonHSA

Person–centered thinking minibook www.helensandersonassociates.co.uk

Habits pack for managers and staff (this includes the Achievement Skill and the Person–centered thinking rating scale) www.helensandersonassociates.co.uk

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Think and Plan – a free website for people to use person–centered thinking online www.thinkandplan.com

Michael Smull. A series of films on each person–centered thinking skill www.youtube.com/user/helensandersonHSA

100 one–page profiles – a free website which explains how to develop one–page profiles and shares 100 examples with stories of the difference made by having one http://onepageprofiles.wordpress.com/

Person–centered thinking minibook www.helensandersonassociates.co.uk
Community connecting minibook www.helensandersonassociates.co.uk

E–learning – an e–learning package that enables you to learn about and use 12 of the person–centered thinking skills Hsaonlinelearing.org

LifeCourse Tools: Charting the LifeCourse https://www.lifecoursetools.com/

Michael Smull films for managers. 'A Rock in a Pond' and 'Person–centered plans that make a difference' www.youtube.com/user/helensandersonHS

Five Ways to Wellbeing

Wellbeing teams Wellbeingteams.org

Values based recruitment

Courses/consultancy

Person–centered thinking

Managers – making person–centered thinking a habit

Coaching skills for managers

One–page profiles and person–centered descriptions

helensandersonassociates.com

Community–Circles

Supported Decision–Making

Just Enough Support

Charting the LifeCourse Trajectory and Integrated Star

helensandersonassociates.com

Person–centered Teams

Positive and Productive Meetings

Person–centered supervision

Person–centered risk

Values–based Recruitment

Leading Person–Centered Change

helensandersonassociates.com