



PERSON-CENTRED  
APPROACHES TRAINER  
MANUAL

Day 1

This Person-Centred Approaches curriculum includes person centered concepts, principles and materials used with permission from The Learning Community for Person Centered Practices. Find out more at <http://tlcpcp.com>.



The Learning Community  
for person centered practices

Trainers are required to participate in an update session and sign an agreement with a H S A Mentor Trainer prior to getting access to and using this updated version of the curriculum. Once completed, the trainer will be given access to a membership page (<http://hsaonlinelearning.org>) where they will be able to access training materials. For more information contact [info@hsacanada.ca](mailto:info@hsacanada.ca)

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Welcome to the 2022 edition of the Person-Centred Approaches Trainers Guide. You will find it has been formatted for ease of use and is designed to view two pages at once. The left side of the Guide provides the Trainer with a snapshot of key information on how to address the slide being viewed by the class. The right side of the Guide provides a suggested script and key points that includes narrative that can be shared with the class. The script includes expanded information that builds on the Core Responsibilities of what must be presented to the class and is designed to be a guide that helps Trainers think of how to present the material.

Test your printing by printing 6 pages back to back to ensure that it prints properly. Some printer recognize the number 1 on the second page as being the first page to print. You might have to print pages 0-5 in your test. Let us know if you run into any problems.

<p><b>Purpose:</b> <b>Time:</b> <b>Workbook Page:</b></p>	<p>Slide</p> <p># of animations</p>	<p><b>Suggested Script to Address Concepts</b></p> <p><i>Use old script and identify what needs to be said verbatim, where there is room to use creativity to make the same point but in trainer's own words</i></p>
<p><b>Core Concepts To Cover</b></p> <ul style="list-style-type: none"> <li>Key points that MUST be addressed</li> </ul> <p><b>Where To Use Judgement &amp; Creativity</b></p> <ul style="list-style-type: none"> <li>Where there is/isn't the opportunity to be creative</li> </ul> <p><b>Not Your Typical Responsibility</b></p> <ul style="list-style-type: none"> <li>Where it is best not to go</li> </ul>	<p><b>Tips To Address Concept</b></p> <p><i>Tried and true trainer tips to deliver content</i></p>	<p><b>Transition</b></p> <p><i>How to make a smooth transition to the next slide</i></p>
<p><b>Own Examples To Use</b></p> <p><i>Space for Trainers to write their own example to illustrate concepts/ content. Can put NO Example needed in spots where it is just content delivery</i></p>	<p><b>Questions For Debrief/Discussion</b></p> <p><i>List of questions for areas that debrief is needed or advised in order to facilitate learning</i></p>	

Left side: Quick Glimpse of What To Do

Right side: Suggested Script and Slide Transition

The Person-Centred Approaches course is traditionally provided over 2 consecutive days. However, it can also be provided in a more modular fashion, depending how classes need to be structured. If you wish to breakdown the training into modules, please review your intentions with an H S A Mentor trainer.

When using the modular approach, it is recommended participants have an assignment of using the skills learned in that module between sessions. This will keep learning fresh and provide the opportunity to practice what has been learned.

To best use this guide, you are encouraged to use it in conjunction with the slideshow in order to fully understand the intricacy of the presentation. The slideshow should be in presentation mode so that the animation features are engaged, and the Trainer becomes comfortable with the flow of the training.

#### **DETAILS REGARDING PERMISSION TO USE TRAINER MATERIALS**

- ✓ This is the official version of the H S A Person-Centred Approaches Curriculum. Any changes need to be reviewed by an H S A Mentor Trainer to ensure consistency in quality and latest learning.
- ✓ The slideshow is for Trainers only and can only be shared by H S A. They cannot be used by colleagues who have not be credentialed by H S A.
- ✓ As a Trainer you have the ability to add slides to personalize the presentation. You are welcome to ask H S A to review for feedback and support.



**Purpose:**

- ✓ This is the slide that you leave up while you are waiting for the training to start.
- ✓ Introduce yourself briefly, and participants themselves using a round.

**Time:** 15 minutes

**Workbook Page:** N/A



**Core Concepts To Cover**

- Everyone is welcomed and introduced.
- Define and demonstrate “round”

**Where To Use Judgement & Creativity**

- Consider using music, greet participants at sign in, etc. to create hospitality and begin conversations

**Not Your Typical Responsibility**

- If people feel welcomed or not

**Tips To Address Concept**

- Explain what a Round is before starting
- Ask people to provide short answers (a sentence rather than a paragraph)

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief required

### Suggested Script to Address Concepts

Good Morning! Welcome to PCT Day 1. Thanks for making the time to be here. (Briefly introduce yourself, handle any logistics like bathroom locations)

I'm looking forward to learning from each other over the next several days. I'd like to start off by giving us a chance to get to know who is here in the room. Just brief introductions.

We are going to practice a skill called "a round." During a round everyone has an opportunity to respond to a specific question. We will go in consecutive order and we all give full attention to one another. However, we do not reply or respond to what people share. We just listen. Since we have lots to do today, we will look at keeping this brief.

**Introduction round:** Please share with us your name, where you work and one thing that is going well at work or in your personal life. Who would like to start?

After the introduction round, work through the **meeting map** together:

- purpose, agenda already on the meeting map
- roles ready to add: trainer, hospitality, timekeeper
- ground rules – have blank stickies and markers ready for developing these with the group

### Transition

- Next slide will introduce The Learning Community for Person-Centred Practices and HSA Canada

**Purpose:**

- ✓ Explain who H S A is
- ✓ Introduce yourself as a H S A credentialed trainer.
- ✓ Inform participants about The Learning Community for Person Centered Practices (TLC) and its work. Provide broad/ international context.

**Time:** 2-3 minutes

**Workbook Page:**



**Core Concepts To Cover**

- PC approaches can be helpful in any culture, with any human
- Provide national impact of the training and why it is important people go through it
- TLC focus, purpose and global impact

**Where To Use Judgement & Creativity**

- Sharing an example outside of the disability world that would be meaningful to the group

**Not Your Typical Responsibility**

- To go in-depth about the Learning Community and everything it does and offers

**Tips To Address Concept**

- Be Brief-assume they are reading the slide so only add one or two additional points that are not obvious from the slide. Summarize – e.g. “we help people have positive control over their own lives”
- Examples of other points that you can make follow, but remember to be brief – only use 1 or 2. Be conscious of time.

**Questions For Debrief/Discussion**

No conversation questions or debrief needed

**Own Examples To Use**

### Suggested Script to Address Concepts

#### **HSA**

Helen Sanderson Associates is part of an international group. There are HSA teams in Canada, the UK, Australia, New Zealand and the United States. HSA are member of The Learning Community have had representation on the Board of Directors since its inception.

Helen Sanderson Associates: Are catalysts for person-centred change and work with individuals and families as well as teams and organizations in learning, developing and supporting person-centred practices and delivering personalized supports. Their work includes: Person-centred thinking, person-directed planning, person-centred teams, supervision and organizational change efforts.

If you were trained as a trainer by HSA, explain that you were trained by HSA mentor trainers and are now part of the Learning Community as well.

#### **TLC**

As a community, we encourage each other to stay current on what we are learning about how to use the tools/skills to help people get the lives they desire. This volunteer organization credentials Person-Centred Thinking Trainers.

The Learning Community has drawn from their experience to develop materials to assist people across issues of disability, illness, and circumstance: developmental disabilities, mental health services, aging, chronic illness, cancer treatment planning; wellness, end of life planning, self-advocacy, helping families help other families, community building, person-centred organizational and system development to name a few.

Different Countries are at different places along the never-ending journey of Person-Centred Practices. In Australia they have the National Disability Insurance Scheme – where all people using disability services throughout the country are in charge of how their resources are spent. In India, the focus is on creating accessibility for people with disabilities. In the United States, they are experiencing changes with the rules that govern Medicaid Waivered Services with the Community Settings Rule and building Person-Centred Practices into how supports are delivered. In Canada, every province is different. ***Add info about the province you are delivering in.***

#### Transition

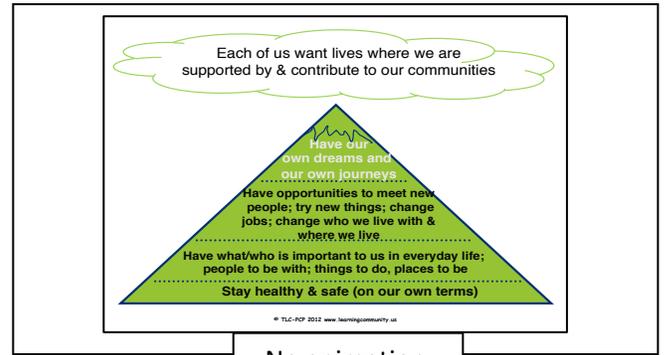
- The next slide will introduce the pyramid, a conceptual framework for looking at the relationship between health and safety, having what is important to and dreams
- A segue to the “Terminal Irritation” exercise

**Purpose:**

- ✓ To provide a conceptual framework for looking at the relationship between health and safety, having what is important to and dreams
- ✓ A segue to the “Terminal Irritation” exercise

**Time:** 5 minutes

**Workbook Page:**



No animation

**Core Concepts To Cover**

- Review each level of the hierarchy

**Where To Use Judgement & Creativity**

- Examples to illustrate each level

**Not Your Typical Responsibility**

- To explain Maslow’s hierarchy

**Tips To Address Concept**

- Having an example you can build on for each level provides continuity and shows how we can’t stop at any level when supporting people.
- 

**Questions For Debrief/Discussion**

- No debrief. This sets the stage for the rest of the day.

**Own Examples To Use**

### **Suggested Script to Address Concepts**

This triangle is one way to think about how we help people have positive control in their lives

First - It is about people not “disability” – it is true for all of us

- ◆ We all need and receive support
- ◆ We all contribute, not just via our jobs, but by how we spend time and through relationships
- ◆ We all want to have control over our lives – to journey towards our dreams.

The triangle –

- Walk through from bottom to top
  - Have any of you ever had a time in your life when you didn’t feel safe? The focus of your “dream” then was to be safe
  - Had a sudden health crisis- and getting healthy consumed you?

The segue –

Ask these questions (and wait for the answers) –

- ◆ How many of you eat or drink something fattening after you have a bad day?
- ◆ What would happen if you had a bad year?
- ◆ Would you become a bigger person? (gain weight)
- ◆ What if, in the middle of that bad year, I came and said that we had been graphing your weight and were putting you on a 1,200-calorie diet. Would the bad year have gotten better or worse?

Emphasize how having what is ‘important to’ relates to being healthy and safe. When things that are important to you are missing, we often act in ways contrary to what is important for us.

Some people find it difficult to dream or have goals because their basic needs of safety or health are not met. Person-centred planning cannot only focus on ‘fluffy’ dreams, it needs to identify how people need and want to be supported to be healthy and safe as well as having what is important to them in everyday life – or at least moving towards this.

### **Transition**

The next slides are for Terminal Irritation. The third one will stay up as you complete the activity. Be sure you have enough time to complete the activity (you don’t want to split it up over a break)

**Purpose:**

- ✓ To help people in positions of power and control understand: the effects of not being listened to, being helpless, how challenging behaviors arise from these circumstances, and the implications for person-centred thinking efforts in how we support people.

**Time:** 25 minutes (depending on group size and discussion can go to 45 minutes)

**Workbook Page:**

**Core Concepts To Cover**

- All components of the activity
- Build discontent

**Where To Use Judgement & Creativity**

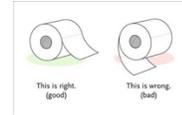
- *Activity must be followed directly as script presents each component*

**Not Your Typical Responsibility**

- To let people deflect from feeling the discontent (don't let them give "they would" responses)
- To get into rationalizations of your actions
- To get into discussions with the class during the activity

**Own Examples To Use**

What grates on your last nerves?



3 slides

**Tips To Address Concept**

- Done well this exercise causes your audience to feel depressed – do not leave them in that depressed place, do it as the last of a series of exercises or at the end of the day.
- This exercise will not work where people are afraid of self-disclosure
- It is not a good idea to do this when a portion of your audience currently experience the nightmare, or have recently lived in a situation as described (typically family members and self-advocates, may be offended at the appearance of lightheartedness at the beginning of the exercise)
- It is not designed to remind self-advocates of how disempowered they were (and often still are)
- If done as a stand-alone activity, be sure there is enough time to debrief on how to apply what was learned

**Questions For Debrief/Discussion**

- Have people share what they are feeling at the end of the activity and talk about this
- Discuss how we have done this often in the name of "best practice" and were taught to do this. The thing about Best Practice is that it changes as we learn more, so let's use what we've learned to move forward

## Suggested Script to Address Concepts

### Set-up:

**Terminal irritation slide is the transition slide. The toilet paper slide is an example of what you are looking for in terms of what grates on their last nerves. Have fun with this slide – laugh with the group!**

- To facilitate this exercise, you will need washable markers, flip chart paper, painters' tape, and, if possible, a volunteer to record
- Then hang up at least 6 sheets of flip chart paper ahead of time. Expect to use 2 sheets for the first questions and one for each of the subsequent questions. Label the flip chart paper headings with the questions that you are going to ask (one per sheet) and post them on top of each other so that one question shows, and people are not able to see what comes next. The questions in order are:
  - What really annoys or irritates you?
  - What do you do to show how you feel?
  - How do supports respond?
  - One Year Later...
  - Five Years Later...
  - What would it take to trust?

This exercise works best when the facilitator is supported by another person writing on the flip chart paper. (A co-trainer can help or invite someone who can write **fast** and legible to assist you. It is best to set this up prior to the start of the training. Tell the writer before-hand that they need to write what you say as you repeat what the participants said.)

### Script:

**Start by asking the training participants to think of all the places they've lived in their lives (growing up with siblings, moving out with roommates, present life, etc.) and then these questions:**

- What habits or behaviors (of others) irritated you?
- What do other people do **at home** that really bothers you, things that make you swear?
- What really annoys you?
- I'm talking about the little things (show next slide with right/wrong toilet paper role). How many of you agree? How many of you disagree? How many of you are thinking...as long as they replace the role I'm good! (show next slide).
- What are the things that others do at home that annoy you?

As people share their answers, the recorder writes them down on the "What Irritates or Annoys you" sheet. Fill up the page (use different colors to keep them separated if you want). Encourage people to share until the group begins to run out of contributions.

As the facilitator is re-stating for a recorder, try to avoid holding up the pace of the exercise by waiting for the recorder to catch up. Instead, condense long explanations into short, catchy phrases which are more easily recorded. For example, when someone describes people who "always takes the remote and changes the channel to what they want" condense it to "remote hogs" or people who "always see what's wrong, talk about the negative stuff, are all doom and gloom" can be described as "naysayers".

## **Script Con't**

**Then weave the responses into a story describing a place where many of the things listed are actually**

**happening, such as:** Due to health reasons you now need to live in a long-term care facility. You are living with people you don't know and they are doing all the things on the list that annoy you. (Read some of the items strung together as a description of what happens there. All of these behaviors are present and the behaviors that you thought about but did not share are also present. However, you cannot leave this place, you have to stay. You are not in charge of where you live right now. Think about how you feel, then tell us what you would do to show other people how you feel?)

The recorder writes down their responses (on the "What would you do?" sheet). For people who respond in vague, or unclear ways, ask "what would that look like for you specifically?" For example, someone who says "I'd be acting out" or "I'd be a terror" ask what that would look like, or what we would see them doing. Then review them, letting the participants know how the system that runs this imagined place would respond to their actions (behaviors). (Alternatively, you can ask them how they think the system/organization would respond). Then tell them they have now been living there for one year and these things are still happening, how would you feel? (Recorder writes on "one year later" sheet)

**Then tell the participants:**

"It is now 5 years later. The behaviors that irritate and annoy are still going on. But now your new Case Manager comes and does a person-centred plan with you. This person is truly gifted at listening and hears what you are saying with words and behaviors. The planner hears your distress and captures it on paper. The plan is reviewed with you and you discover that it not only describes and explains exactly what irritates and annoys you, but also says what needs to change so that these behaviors will no longer be part of your life. After this remarkable experience, the planner leaves, giving the plan to the facility manager on the way out. The facility manager says, "Just what I needed for the people from licensing who are coming next week." The manager then puts the plan in a file, but nothing really changes, everything goes back to the way it was. Now how do you feel?" (not how you would act)

Write down the responses (on the "Five years later" sheet) and read them back to the participants. Emphasize the themes in how people feel. Ask the group the question "Who are you angrier with, the planner or the manager? Why?" Facilitate a brief discussion around their answers. Expect things like, the manager always acted that way, so it's not a surprise, the planner got my hopes up and the letdown was harder, etc. Be sure to make the point, there is no right answer, everyone will feel betrayed and let down, who they focus this on doesn't change their feelings.

**Then tell the participants:**

"You have a really good Case Manager who comes back to see how things are going. When it is learned the plan has not been acted on, the manager attends a Person-Centred Approaches training and has had a life changing realization that what they do at their work must change. The manager comes back ready to implement the plan. The Case Manager is eager to make the changes and is happy the manager has seen the light. Now what will it take for you to trust them?"

Recorder writes down their responses (on the "What would it take to trust" sheet). Expect to hear responses, such as, "all new staff, move to a new place, actions, time, I want my card back".

Ask 3 final questions: How many people would test the manager? How many would never trust the manager? How many people are living this exact life right now?

**Discussion:** Facilitate a discussion, covering the following points:

- See what the effects of being powerless and not listened to would be in their own lives (and see the effects on other people who are also not labeled)
- Understand how a person-centred plan is a promise and that plans that are developed but not implemented represent a betrayal of trust
- Understand that an entire constellation of behaviors and “symptoms”, including hitting other people, breaking things, withdrawal, and being desperate to please may be a response to years of not being listened to and being powerless, or not having trusting relationships
- What did it feel like to have things important to you taken away?

#### Summary of steps

- Headings are bolded;
  - **1) Things that annoy you**
  - **2) Imagine you moved to long term care where you are now living with people that do all of these things...now how do you feel? How do you show others how you feel?** (yell, hit, hide in your room, drink, etc.)
  - **3) How do supports respond?** (Medication, behaviour modification, socialization programs, etc.)
  - **4) One year later** and nothing has changed...**Now how do you feel? How do you show others?**
  - **5) Five years later, a PCP facilitator** comes in, understands and **writes a plan that captures how you feel. Now how do you feel?**
  - 6) Now the service provider says “great, we now have a plan and it meets our funder’s requirements” and puts your plan away in a file. **Your plan is filed. Now how do you feel?**
  - 7) If **one year later a PCP facilitator** comes in and **asks you how things are going and what you would like to change in your life? How would you feel?**
  - **8) What would it take for you to trust the planning process?**

#### Transition

The next slides reinforce the key concepts from this activity:

- It’s about changing lives and not just creating better paper work.
- It discusses environments and the impact they have on people. Since people were just in a toxic environment, this helps people identify contributing factors to environmental settings.
- Planning is a set of promises

**Purpose:**

- ✓ To emphasize planning as a promise; requiring follow through or shouldn't be done.

**Time:** 2 minutes

**Workbook Page:**

Person-centred planning is a set of promises

To listen

To act on what we hear

To be honest

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**No animation**

**Core Concepts To Cover**

- To identify the main impact of using the skills taught in class

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

### **Suggested Script to Address Concepts**

The Terminal Irritation exercise helps us consider what the impact of being powerless & not listened to may have on us and those we support.

An entire constellation of behaviours & 'symptoms' including hitting other people, breaking things, withdrawal & being desperate to please may be a response to years of not being listened to & being powerless.

#### **A Promise to listen**

to listen to what is being said and to what is meant by what is being said  
to keep listening

#### **A Promise to act on what we hear**

to always find something that we can do today or tomorrow  
to keep acting on what we hear

#### **A Promise to be honest**

to let people know when what they are telling us will take time  
when we do not know how to help them get what they are asking for  
when what the person is telling us is in conflict with staying healthy or safe and we can't find a good balance between important to and important for  
A mediocre plan that's implemented (meaning promises are followed through) is infinitely better than a fabulous plan that sits in a file folder.

### **Transition**

**Purpose:**

- ✓ To set the stage for upcoming learning.
- ✓ To create a broad context

**Time:** 2 minutes

**Workbook Page:** Pg.

“ Person-centred thinking and planning is a process of continual listening and learning, focusing on what is important to someone now and in the future and acting upon this in alliance with their family and friends.”

No animation

**Core Concepts To Cover**

- The principles and techniques we are teaching are a set of skills
- These skills help us to be effective at all levels and with all people

**Where To Use Judgement & Creativity**

- Add examples to illustrate the result of the skills

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief here.

### Suggested Script to Address Concepts

Talk about the importance of supporting the person within the context of the relationships that matter most to them. Family and close friends usually know the person best and, with the person, are considered to be **content experts**.

What we are learning today, are person-centred thinking tools/skills that can help us get to know the person and explore how they want to be supported. This is a continuous learning process and is not an event in time. It doesn't happen only at the annual government required planning meeting!

Person-centred thinking and planning is also a promise to act on what we learn. It's a bridge to action planning and helping the person have choice and control in their lives and develop a positive vision of the future and personal outcomes / goals to help them work towards the future they desire.

### Transition

**Purpose:**

- ✓ To identify for the group the ultimate outcome we are trying to achieve by offering the training.

**Time:** 1 minute

**Workbook Page:** Pg. 7

“ Help people get better lives...  
...not just better paper ”



No animation

**Core Concepts To Cover**

- To identify the main impact of using the skills taught in class

**Where To Use Judgement & Creativity**

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- 

**Questions For Debrief/Discussion**

**Own Examples To Use**

**Suggested Script to Address Concepts**

Points to make

- This is not about simply creating better paper
- It is about helping us to use our existing time -to get better results -to work smarter not harder...not about MORE work.
- The only reason to do this is to make a difference in people's lives.

This training is about helping people learn every day skills that help us help people get better lives.

**Transition**

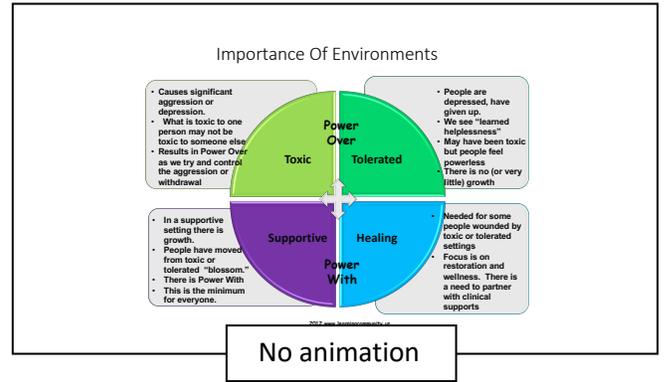
The next slide helps participants understand the importance of the environment and deepen their understanding of the Terminal Irritation experience.

**Purpose:**

- ✓ A visual to identify 4 types of environment defined from the perspective of people served.

**Time:** 5 minutes

**Workbook Page:**



**Core Concepts To Cover**

- To review each of the 4 environments

**Where To Use Judgement & Creativity**

- No creativity or judgement on the definitions
- Use creativity and judgement to provide examples for each environment that works for the group

**Not Your Typical Responsibility**

- To go into depth with any of the environments (this is just an introduction to the concept)

**Tips To Address Concept**

- Use examples that are not related to the disability system to show it impacts all of us
- Identify the circular shape to point out we can be in multiple environments at any given time (ex. toxic at work, supportive at home)
- Make clear the fact that this is not about "placement" but rather about "environment". One's own home can be toxic. The key question – where does the power lie?

**Questions For Debrief/Discussion**

- No debrief here. We are just laying the groundwork for the rest of the training

**Own Examples To Use**

## Suggested Script to Address Concepts

### **Toxic –**

- When an environment is toxic (offensive, harmful, extremely unpleasant) what is present or absent causes people to complain about the environment with their behavior. The typical emotional response to a toxic environment is either anger or depression. What is seen or observed is aggression or withdrawal and is typically labeled as dysfunctional.
- While there are some things that are toxic to everyone there are other things that are toxic to some people but not others.
  - Examples of settings toxic to all include places where abuse or violence are common.
  - There are also settings toxic to some individuals but not others. While one person may find a setting with much commotion, loud talkers, loud music or TV, and constant activity very toxic, another person may find it satisfying, comforting or stimulating.
- By paying attention to what a person *does*, and interpreting it differently, we can learn about what is dissatisfying and must change.
- Interventions designed to increase a person's tolerance of toxic settings without changing the setting should be unacceptable (and considered unethical). Critical aspects of what is important to the person are absent and make the person less healthy and less safe (adversely affects important for). *Provide an example*

### **Tolerated –**

- In a tolerated environment activities and interactions are endured, withstood, or 'put up with.' Complaints about the setting are less dramatic but withdrawal and depression are still common.
- A key indicator is that growth is also absent. People languish when they live by simply tolerating what's around them.
- If depression and withdrawal are adaptive responses to the setting, then the use of medication to treat the depression is simply addressing the symptom and not the cause. Often the withdrawal is an expression of helplessness, or despair at the lack of control or authority to change the unacceptable.
- Paid employees in these environments often see their role as caretaker with cooking, cleaning and paperwork more of a priority than building supportive relationships that promote learning for the person. *Provide an example*

### **Supportive –**

- In a supportive environment, interactions between people are encouraging, reassuring and empathetic.
- What is **important to** as well as what is **important for** the person is largely present and balanced.
- People who are in supportive settings experience significant growth.
- For people without significant clinical issues, this setting is good enough. People who have been in toxic settings and do not have significant clinical issues can "blossom" in these settings. *Provide an example*

### **Healing –**

- Where people have been wounded by prior experiences such as physical or sexual abuse or neglect or abandonment; where people have a significant mental health issue; an environment that promotes healing is needed.
- In a healing environment, interactions between the people present are restorative and focused on developing wellness. A healing environment represents the marriage (reliable blending) of good Person-Centred Practices with sound clinical practices. *Provide an example*

**Supportive environment works for most people. Healing – most important for people have experienced significant trauma or have significant mental health issues**

## Transition

The next slides introduce the core concept of Important To and Important For

**Purpose:**

- ✓ To provide an introductory discussion of the fundamentals of the concept to create a foundation for a the service-community life discussion.
- ✓ To create a foundation to build from during the more detailed discussion and practice that comes after the overview.

**Time:** 2 minutes

**Workbook Page:**

Introducing the Core Concept:

**IMPORTANT TO**  
**AND**  
**IMPORTANT FOR**  
**AND**  
**THE BALANCE BETWEEN THEM**

No animation

**Core Concepts To Cover**

- This is the filter we need to use when learning about someone

**Where To Use Judgement & Creativity**

- None needed

**Not Your Typical Responsibility**

- N/A

**Tips To Address Concept**

- This is the foundation to support someone
- It is a “filter” for all the information we receive

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief here. We are just laying the groundwork for the rest of the training

**Suggested Script to Address Concepts**

Emphasize that this is about humans, not simply disability – as we move through life all of us are juggling things that are important to us with things that are important for us.

**Transition**

The next slide introduces the definition for Important To

**Purpose:**

- ✓ Define Important To and the areas that contribute to it

**Time:** 5 minutes

**Workbook Page:** Pg. 9

**Core Concepts To Cover**

- Define Important To and contributing areas as foundational to Person-Centred Thinking

**Where To Use Judgement & Creativity**

- An example for each of the 6 content areas will help make the concept concrete for people.

**Not Your Typical Responsibility**

- Since this is the Core Concept, it is your responsibility that people understand the definition and difference between To and For

**Own Examples To Use**

**Important TO**

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

- People to be with /relationships
- Status and control
- Things to do and places to go
- Rituals or routines
- Rhythm or pace of life
- Things to have

No animation

**Tips To Address Concept**

- Remember to be brief: give a quick picture of each component of Important To
- What is important to people (what matters to them) includes what they say with their words and what they say with their behaviours. We need to pay attention to both. When there is a conflict, pay attention to behavior and ask 'why', what is the person trying to communicate?

**Questions For Debrief/Discussion**

- No debrief here. We are providing the foundation for the rest of the training

### **Suggested Script to Address Concepts**

Review the definition as stated in the slide and emphasize Important To is the stuff that makes us Happy, Content, Satisfied, Comforted and Fulfilled. It is not stuff we want but is stuff we *need*. We *need* to be happy, content, fulfilled, etc. Important To falls in six main categories:

- People/Relationships: We all have people in our lives that make us happy. We also have people we *don't* want in our life because that also makes us happy
- Status/Control: We all want to have status. Ask the class what are things that give us status (ex. job, education, where we live, what we drive, who has a better smart phone/TV, where we sit at meetings, cool haircut, clothes brands, etc.) Ask “What do we do to help people we support have status – it goes beyond just having a job (but that’s certainly a good start)”. When thinking about control, it’s all about making decisions for our life. Some of those decisions are “I can do that myself, I don’t need help” or “You are really good at that and I’d like to learn. Can you help me?” or “You are really good at that and I’m not. Can you do it instead?” Typically, in our system, people don’t move forward until they can do everything for themselves. How many of us would never have moved if that was applied to us?
- Things to do/Places to go: We all have these things in our lives
- Routines/Rituals: This area is where we can really help people have positive control over their lives
- Pace of life: How many of us are Type A people? How many are more “go with the flow” kind of people? What happens when we have to interact with the opposite type from us?
- Things to have: How many of us have collections? Ask people who raise their hand what they collect. Ask what happens when people in our system have collections – do they get labels of “hoarders” or are limitations placed on those collections (i.e. you have enough of those things)

What is Important To us is typically simple stuff and it isn’t limited to one area of our life. How many of you are morning caffeine junkies? Hot caffeine? Cold caffeine? (wait for a show of hands) I bet it doesn’t matter where you are in the morning, you still get your fix, right?

How many of you when you’ve had a hard day and want to relax like to take a bubble bath? I bet you wouldn’t ever live anywhere that didn’t have a tub.

If we think about the records we have for people, how much information would you say captures what is Important To a person? (demonstrate this by holding your hands in front of you like you are holding a large stack of paper. Slowly start to bring your hands closer together until the class tells you to stop). How can we support people in having what is Important To them if we don’t have the information in our records?

### **Transition**

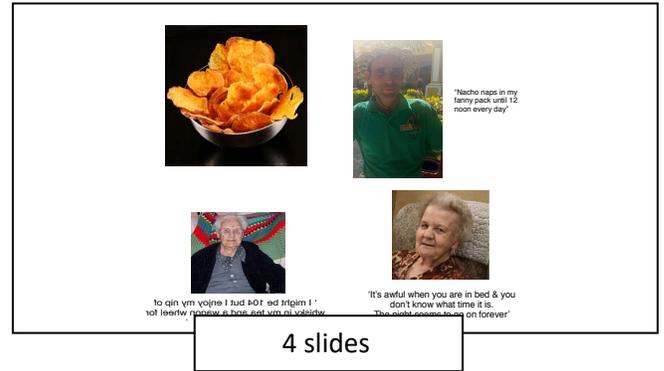
The next slides provide a number of examples of Important to.

**Purpose:**

- ✓ Provide examples of Important To

**Time:** 5 minutes

**Workbook Page:**



**Core Concepts To Cover**

- Define Important To and contributing areas as foundational to Person-Centred Thinking

**Where To Use Judgement & Creativity**

- Concrete examples

**Not Your Typical Responsibility**

- Since this is the Core Concept, it is your responsibility that people understand the definition and difference between To and For

**Tips To Address Concept**

- Remember to be brief: give a quick explanation of the examples of Important To

**Own Examples To Use**

The PowerPoint includes a number of examples. You can substitute these with your own.

**Questions For Debrief/Discussion**

- No debrief here.

### **Suggested Script to Address Concepts**

The following slides are examples of what is important to people.

#### **Potato chips**

The potato chips example is used throughout this section. You can replace it with your own.

Julie loves potato chips. She has since she was a little girl.

It's also her go-to comfort food when she is stressed, sad or bored.

Julie loves specific brands and specific flavours.

#### **Ignacio**

Ignacio, a gardener from Cuba. He carries a pet crab named Nacho with him every day. Nacho stays in his fanny pack around his waist until noon every day. Ignacio then takes him out and he stays on his shoulder for the rest of the day.

He is very picky about who he allows to hold Nacho.

#### **Winnifred**

What if the nursing home where Winnie is moving to doesn't allow her to have alcohol in her room? Could this have an impact on her quality of life and things feeling right for her? If there are systems rules that get in the way of what is Important To someone, how do organizations challenge and advocate for people to have choice and control in their lives?

#### **Don't know what time it is**

For Joan, what seems like a small thing such as a clock has an impact on sleep which over time could have an impact on overall health and quality of life. By asking Joan what was working and not working for you, they discovered that when cleaning staff moved her clock, it had an impact on her sleep. As a team, they identified this as being important to Joan and were more careful moving forward. They also looked for other solutions such as a clock that projects to the ceiling and a voice activated clock so that Joan could still tell the time even if someone accidentally moved the clock.

### **Transition**

The next slides focus on Important For

**Purpose:**

- ✓ To define important for and help people see that health and safety are complex issues, not just labels.

**Time:** 2 minutes

**Workbook Page:**

**Important FOR Part One:**

Issues of *health*:

- Prevention of illness
- Treatment of illness / medical conditions
- Promotion of wellness (e.g.: diet, exercise)

Issues of *safety*:

- Environment
- Well being --- physical and emotional
- Free from fear

**Important FOR Part Two**

What others see as necessary to help the person:

- Be valued
- Be a contributing member of their community



2 slides

**Core Concepts To Cover**

- To define Important For

**Where To Use Judgement & Creativity**

- N/A

**Not Your Typical Responsibility**

- Since this is the Core Concept, it is your responsibility that people understand the definition and difference between To and For

**Tips To Address Concept**

- Don't spend a lot of time on this slide. People are well versed in Health and Safety

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief. This sets the foundation for the rest of the training

**Suggested Script to Address Concepts**

We won't spend a lot of time on this slide because this is the stuff we already know. We know how to keep people healthy, we know how to keep people safe. *Review the information on the slide.*

There is another piece of Important For that is more subtle . . . .*transition to next slide*

The other piece of Important for is being valued in the roles we hold. It is important for us to learn the skills and unwritten social rules so that we can participate in our communities and been seen as valuable.

Examples: table manners in public spaces, hygiene, waiting in line

We all have choice to not follow these unwritten rules but there are natural consequences to those choices – ie: people may not want to be around us, we will be seen as “odd” or “different”. What we don't want is for people with disabilities to have different rules due to pity or tokenism. This encourages the perception that people with disabilities are less valued as human beings.

**Transition**

The next slides will discuss how Important to and Important For are connected

**Purpose:**

- ✓ To illustrate that taking an all or nothing approach is not helpful

**Time:** 2 minutes

**Workbook Page:**

all choice no responsibility

to



All choice: No responsibility

No animation

**Core Concepts To Cover**

- Person-Centred Practices is not about giving people whatever they want

**Where To Use Judgement & Creativity**

- How to help people recognize there are boundaries to choice

**Not Your Typical Responsibility**

- To get into detailed discussions about choice. This will be covered in a later section of the training.

**Tips To Address Concept**

- Try asking if any of the participants have seen choice used as an excuse – use the question as the segue to the next slide
- Use the first slide to discuss the dangers of only focusing on Important To and abandoning people with their ‘rights’
- Use the second slide to have fun and show that over focus on Important To and abandoning people can put them at serious risk.

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief. This is part of a 3 slide series

### **Suggested Script to Address Concepts**

This is what every parent is afraid of.

This is what we need to avoid. One of the mistaken assumptions about person-centred practices is that it is all about “choice”. We cannot only listen to what is important to and ignore what is important for. Person-centred thinking is about taking a balanced approach.

We all have examples of where choice was used as an excuse - we don't want to set people up to be hurt. We want to recognize that what we are trying to do is just what we do for ourselves – find a balance.

### **Transition**

The next slide will discuss how the Important To and Important For are connected

**Purpose:**

- ✓ To illustrate there are boundaries and it's not all or nothing

**Time:** 1 minute

**Workbook Page:**



Health and safety can dictate

Health and Safety can dictate life

for

3 slides

**Core Concepts To Cover**

- Person-Centred Practices is not controlling people because of our fear of liability or sense of responsibility for their health and safety

**Where To Use Judgement & Creativity**

- How to help people recognize there are boundaries to choice

**Not Your Typical Responsibility**

- To get into detailed discussions about choice. This will be covered in a later section of the training.

**Tips To Address Concept**

- Try asking people what life is like for people when there is an over focus on Important For (health/safety/social expectations)
- Use the second and third slide to have fun and show how life might feel confining when the supports are overly focused on Important For. For some, it might feel like we make them jump through hoops while for others it feels like we are bubble wrapping them.

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief.

### **Suggested Script to Address Concepts**

This is where we were. We organized services around diagnosis and type of support needed (medical, behavioral etc....). You can often tell where someone is going to live or where they will spend their days if you know their labels.

Examples:

The “Behavior home” or the “non-ambulatory home”. We grouped people based on labels – not based on how people want to live.

When we only concentrate on what is important for the person, we often end up limiting their ability to exert control in their life. This often leads to the restriction of rights that are important to the person. i.e. I have high cholesterol therefore staff now limits my intake of potato chips, cheese, etc.

To provide continuity, an example might be asking how many people like pizza. Now imagine all you pizza lovers have high cholesterol and live in a place where health and safety dictate lifestyle. How much pizza would you get? How many would be happy never having pizza again? It’s a life no one wants.

### **Transition**

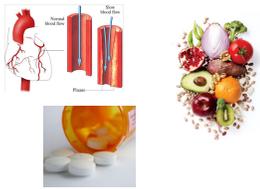
The next slide is about Balance between Important To and For. We will continue with the food example

**Purpose:**

To give an example of Important For and show how sometimes they can be the total opposite of what is important to someone.

**Time:** 2 minutes

**Workbook Page:**



Mommy song

No animation

**Core Concepts To Cover**

- Balance between Important To and For
- It is a matter of Both/And, not Either/Or

**Where To Use Judgement & Creativity**

- Use of examples that connect previous slides

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- Connecting the Important To and For slides by an example (i.e. potato chips) helps to show the concept of Either/Or and Both/And
- The second slide is a fun video that can be used to show how a life focusing on Important For might feel. It is also a great opportunity to talk about the difference between family-centred and person-centred. You can ask the group if their organization sees the person as being their primary customer or if they see the family as being their customer. In times of differences of opinion / conflict, if we only listen to family, we are not being person-centred.

<https://www.youtube.com/watch?v=Ouql6gcZpJA>

**Own Examples To Use**

**Questions For Debrief/Discussion**

### **Suggested Script to Address Concepts**

This slide is what is Important For Julie

- At the age of 19, Julie's doctor discovered that Julie had high cholesterol. Julie's family history also includes heart disease (Paternal grandfather and aunt), mother having a heart attack, many family members struggling with high cholesterol and high blood pressure. Although Julie is thin and young, she is at risk since she is showing early symptoms.
- The doctor suggests that if the cholesterol cannot be managed through exercise and better eating, Julie will need to start medication. (At 19, Julie does not want to start medication for this). At this point she still has choice and control about what to do.
- When support services only concentrate on what is important for the person, they often end up limiting their ability to exert control in their life. This often leads to the restriction of rights that are important to the person. i.e. A response to high cholesterol might have been the medication as well as being 'put on a cholesterol diet'.

### **Mommy song**

<https://www.youtube.com/watch?v=Ouql6gcZpJA>

Facilitate a short group discussion by asking how this video might relate to their work. The key message to draw out is:

- When adults with disabilities require substantial supports, some support staff unintentionally take on a parental approach rather than a supportive approach. The video demonstrates how this might feel.

### **Transition**

The next 4 slides provide a story to practice discovering Important To/For and Balance

**Purpose:**

- ✓ To introduce the key concept of balance between Important To and Important For before moving to a story to practice the concept

**Time:** 2 minutes

**Workbook Page:**

to for

balance

Balance means



No animation

**Core Concepts To Cover**

- Balance between Important To and For
- It is a matter of Both/And, not Either/Or

**Where To Use Judgement & Creativity**

- Use of examples that connect previous slides

**Not Your Typical Responsibility**

**Tips To Address Concept**

- Connecting the Important To and For slides by an example (i.e. potato chips) helps to show the concept of Either/Or and Both/And

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

This is what we seek in our own lives and often find it difficult. When our lives feel out of balance, we look to see what we can change to get a better balance. So, our work can be seen as trying to do for others what we do for ourselves. We recognize in our own lives that it is never perfect, and it is ever shifting. It is even more difficult when we are describing what a balance looks like for another person and recognize that it shifts for them as well.

- How important are your key confidants to you – the people that you share your secrets with? How does it affect your balance when one of them moves away?
- If you were someone who only had paid staff as your confidants and had no control over who came into your life next, how would it affect your balance?
- How do we help figure out the balance for someone else? Listen to them? Where is the conflict? Where is the balance?

In the pizza example, ask what would be a good balance for the pizza lover who has high cholesterol? Maybe the person would rather cut back on other foods, exercise more, etc. and continue to have pizza on a regular basis. Our efforts need to be guided by what is important to the person.

After people share their examples point out how easy it was to come up with the answers. Point out it was easy because the first thing we focused on was what was Important TO the person. If we focus on the Important For first, we will never get to the TO. We must always focus on the Important TO first in order to find the balance that would work for the person.

### **Transition**

We are going back to Julie's potato chip example to show that balance is not always perfect.

**Purpose:**

- ✓ To show how balance is not necessarily balanced perfectly.

**Time:**

**Core Concepts To Cover**

- Balance is never 100% perfect. Not for any of us

**Where To Use Judgement & Creativity**

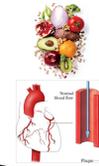
- How you make the story come to life, while keeping all the key points.

**Not Your Typical Responsibility**

- 

**Own Examples To Use**

My balance....



balance

No animation

**Tips To Address Concept**

**Questions For Debrief/Discussion**

**Suggested Script to Address Concepts**

If Julie is struggling with stress or sadness right now, what would happen if we paid more attention to her physical health (important for) rather than her emotional health and how she is using chips to cope with the stress/sadness?

Ask the group for their thoughts. You can also link this to the Terminal Irritation exercise from earlier.

Instead, shouldn't we be exploring how we can assist Julie in lowering her cholesterol levels without having to give up her chips? Maybe Julie would rather cut back on other foods, exercise more, etc. and continue to have potato chips on a regular basis. Our efforts need to be guided by what is important to the person.

**Transition**

**Purpose:**

- ✓ To deepen the key concept of balance between Important To and For –

**Time:** 2 minutes

**Workbook Page:**

**Choice and Balance**

As we think about choice, we can see  
- All choice can be irresponsible (happy and dead)  
- And dictating lifestyle is unacceptable (alive and miserable)

Good support means finding the balance  
- Finding the balance can create conflict  
- We all have a right to make choices, even bad choices

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2 animations

**Core Concepts To Cover**

- To identify balance of choice
- It's a matter of "both/and" not "either/or"

**Where To Use Judgement & Creativity**

- Examples to illustrate the points

**Not Your Typical Responsibility**

- To problem solve with participants

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

**Suggested Script to Address Concepts**

All choice and no responsibility leads to happy, but DEAD people.

And if we are too focused on health and safety, we risk dictating lifestyle, and while people are alive, they're miserable!

Good Support means working to find the balance – everyone has a right to make choices, even bad choices. And while we are paid to “help people stay safe” it's not our job to dictate lifestyle. Finding the balance may lead to conflict.

This is not a matter of you can either be happy or healthy; satisfied or safe – it's about making decisions that help us be healthy AND happy; satisfied AND safe. It's a matter of supporting people to have both/and

**Transition**

The next slide outlines the boundaries of choice. All choice has boundaries.

**Purpose:** To introduce what needs to be in place to help people have control over their lives

**Time:** 1 minute

**Workbook Page:**

### Control of the “W’s”

The Person has positive control over the “w’s”

- What, Where, When, Why...

- The Person decides the “how”

No animation

### Core Concepts To Cover

- This is a transition slide to decision making
- Review what the “W’s” are

### Where To Use Judgement & Creativity

- How you describe the W’s
- Examples used to make your points

### Not Your Typical Responsibility

- To problem solve with participants on individual situations they may want to discuss

### Tips To Address Concept

### Own Examples To Use

### Questions For Debrief/Discussion

No debrief needed. This is an introductory slide

### **Suggested Script to Address Concepts**

When we are thinking of supporting people to have positive control over their lives, we need to be mindful that they are the experts. In order to learn how to best support someone, we need to know

- What they want (or don't want)
- Where they would like the supports to be provided
- When the supports should be provided
- Why they are saying/doing this

Once we understand (remember we want to dig beneath the surface), we need to know

- How the person wants to be supported

People who have not have much opportunity to have control over their lives may not know how to do this and part of our support may need to be identifying ways to create these opportunities.

### **Transition**

The next slide takes the W's and focuses on decision making

**Purpose:**

- ✓ To identify key elements for decision making and introduce boundaries

**Time:** 2 minutes

**Workbook Page:** Pg. 26

**Core Concepts To Cover**

- Review all 3 points of the slide

**Where To Use Judgement & Creativity**

- Use of examples to illustrate the concepts
- Use of information from the *Choice and Control* article

**Not Your Typical Responsibility**

- To just read the slide

**Own Examples To Use**

Empty box for providing own examples to use.

**Choice  
A Key to Positive Control**

- Choice is not picking between two options (this or that)
- Choice has limitations and impact (understanding them)
- The person must find the options appealing to them

Adapted from TLCPCP 2019 w/

No animation

**Tips To Address Concept**

- Read *Choice and Control* by Michael Smull to have a deeper understanding of the complexity of choice: <http://tlcpcp.com/docs/choice-and-control/>

**Questions For Debrief/Discussion**

Empty box for providing questions for debrief/discussion.

### **Suggested Script to Address Concepts**

Decision Making is the heart of our work. Helping people to choose the lives that they want to achieve the balance of Important To and For, results from listening to people's words and behavior. Understanding what a person truly wants helps them to have positive control in their own lives. This may be critically important when a person cannot communicate their preferences for whatever reason or circumstance.

- Limiting options to only two is not effective choice, especially when considering a decision with lasting impact (need example). In some cases, a person may need the options narrowed down, but in reality, an either-or choice is rare. "Should I buy..." Yes/No/Save for it/Research it/etc.
- All of the choices we make have limitations and impact. Limitations can be legal, financial, resources, social, moral, personal, geographic. Choices can have a cascading effect where I work impacts my resources and social circles, where I live impacts recreation, social, cultural, etc.
- The choices need to be appealing. If providing choice appears as "this program or nothing" then it is not a choice

### **Transition**

The next slide addresses Choice and Balance (a reinforcement from earlier in the day)

**Purpose:**

- ✓ To emphasize all choice has boundaries – choice is not a “free for all”

**Time:** 5 minutes

**Workbook Page:**

**Core Concepts To Cover**

- Review and provide examples for the 5 points of boundaries
- Discuss how this can frame choice for those providing support

**Where To Use Judgement & Creativity**

- Examples used to illustrate boundaries

**Not Your Typical Responsibility**

- To get into extended conversations

**Own Examples To Use**

**Choice has Boundaries for Everyone**

**Imposed by society**

- Laws
- Expectations/values

**My values**

- What is and is not OK for me and those I trust

**Ripple effect** - One choice creates boundaries on other choices

- My relationships
- The work I do
- Where I live

**Resource Driven**

- Financial – how much time or money I have available

**Risk involved**

The difference is when the boundaries are set for the convenience of the system therefore limiting choices that meet the person's desires: Operating hours, staff available, policies or procedures.

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6 animations

**Tips To Address Concept**

- Use examples outside of the disability world to demonstrate we all have boundaries
- Keeping examples light can help people deal with concepts vs. their concern/conflict about keeping the people they support safe (e.g. I might want to wear pajama pants to work every day, but doing that impacts how seriously people take me... Or: I might like to watch movies in my underwear, but doing that at the theater has consequences...)

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

So, if All Choice is irresponsible but No Choice is unacceptable, finding the balance is a key skill – this is what all PC tools can be used to help us accomplish.

Choice has boundaries for all of us – there is no unfettered choice for anyone. Our choices have consequences and repercussions. The question for any of us – but especially for people we help to support – is where should the boundaries be drawn?

Many things impact the answer –

- Some boundaries are imposed by society (like our laws, cultural values/norms or community expectations)
- Some are imposed by other choices we make (the work I do or the relationships I have create other boundaries: to my resources, flexibility and/or where I live)
- Resources create boundaries for (what we are able to do, such as vacations)
- And safety – for ourselves and for those around us – also creates boundaries. Where we draw the boundaries for those we support is not black and white, but it obviously must be on this side of being safe (for them and others) and alive!

There is no right answer; it differs for everyone. And balance often takes creativity.

How many of you have tried downhill skiing? And how many of you realized it was the worst mistake of your life?  
How many of you would jump out of a plane?

We make those decisions for ourselves and what we need to be safe while doing it.

### **Transition**

The next slide is a 3-minute video to show how we determine risk for ourselves.

**Purpose:**

- ✓ To demonstrate how people determine risk for themselves

**Time:** 3 minutes

**Workbook Page:** Pg. 26

**Core Concepts To Cover**

**Where To Use Judgement & Creativity**

- This Video and debrief is optional. Know your audience and if this would be helpful to them

**Not Your Typical Responsibility**

- How people respond to the video

**Own Examples To Use**

Blank space for providing own examples to use.



**Tips To Address Concept**

- **Before showing video:** talk about how we've come a long way in developmental services but that video is intended on challenging us to always explore how our good intentions may have unintended consequences.
- **Introduce the video – Robert Perske** has done a lot since the 70's to help us think about risk and quality of life. (see script section for more info)

**Questions For Debrief/Discussion**

Blank space for questions for debrief/discussion.

### **Suggested Script to Address Concepts**

Ask the group for their thoughts / reflections.

### **Background info re Robert Perske:**

The following comes for this website: <https://blogs.uoregon.edu/autismhistoryproject/archive/robert-perske-the-dignity-of-risk-and-the-mentally-retarded-1972/>

Robert Perske, "The Dignity of Risk and the Mentally Retarded," *Mental Retardation* 10, no. 1 (February 1972):24-27.

Complete original source available [here](#).

*Robert Perske had a career in pastoral counseling before he became Executive Director of Greater Omaha Association for Retarded Children. He was inspired by the normalization ideal championed by Wolf Wolfensberger and by a trip to Sweden and Denmark, where he witnessed reforms in the lives of developmentally disabled individuals that he believed should be tried in the United States. In arguing that the logic of integration should apply not only to housing, recreation, and employment but to risk itself, Perske went further than many of his peers. His argument against "over-protection" revealed the potential of normalization to transform human lives and, at the same time, suggested why it would be so difficult to implement. Safety and protection were principles that had long guided human services for children and adults with mental retardation. To deliberately expose those same individuals to risks in the name of equality and autonomy was to propose something radical.*

### **Transition**

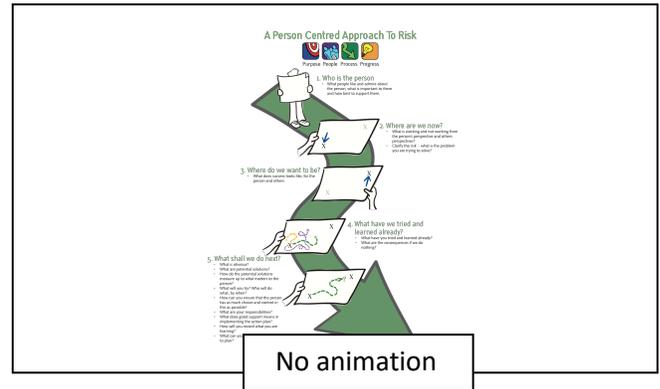
The next slide provides an overview of the H S A Person-Centred Risk planning process.

**Purpose:**

- ✓ To briefly touch on 'risk'
- ✓

**Time:** 2 minutes

**Workbook Page:**



**Core Concepts To Cover**

- To show that bigger risk situations take more planning than what they will be learning in these two days but that the PCT tools/skills can provide help in smaller risk situations

**Where To Use Judgement & Creativity**

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- Inform people that each of the steps has a number of person-centred tools/skills that can help gather important information from the person's perspective as well as other key stakeholder perspectives (family, service provider, community, etc.)

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

**Suggested Script to Address Concepts**

**Transition**

**Purpose:**

- ✓ To briefly touch on 'risk' and balancing Important To / Important For and practicing this

✓

**Time:** 10 minutes

**Workbook Page:**

What are you struggling to balance



activity

**Core Concepts To Cover**

- We all struggle with balancing Important To / Important For and we all do things that put us at risk.

**Where To Use Judgement & Creativity**

- What you share for your own examples.

**Not Your Typical Responsibility**

**Tips To Address Concept**

- This is an activity - Get people to work on this at their tables and then ask for a few examples to share with the larger group.

**Own Examples To Use**

**Questions For Debrief/Discussion**

- What is your vice? What is it you can't live without....no matter what?
- What would happen if health care professionals ignored this when developing a health plan / treatment plan with you? Would you follow their recommendations to a tee?

**Suggested Script to Address Concepts**

Get people to share this at their tables and then ask for a few examples to share with the larger group.

**Transition**

We are now transitioning to the 2-minute drill but will come back to important to / important for. The 2-minute drill helps gather important information about important for.

**Purpose:**

- ✓ To demonstrate the power of getting good information quickly

**Time:** 5 minutes

**Workbook Page:** Pg. 25



**Core Concepts To Cover**

- Show video
- Get answers from class
- Describe the 2-minute drill

**Where To Use Judgement & Creativity**

- Follow activity as designed

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Ask people to watch the video and then we will discuss what they learned. After the video inform people that they will be the one to support Tom. What information did they learn that would be helpful for them?

Answers:

- If he tilts his head certain way it means TV is talking to him
- Must go to store on River Road because he thinks people are after him at Lee Road
- Can't park underground
- All family and friends are gone – not a lot of supports available
- He has a mental illness (if it hasn't been stated yet, ask people what they think the mental illness is)

Ask people if mom's information is what we typically get, or do we get "Tom has schizophrenia" and we have to figure the rest out ourselves. Which is more helpful to you (and him?)

End with telling people this is what the 2-minute drill is designed to do – get to the essence of helpful information to support people. It leads to better discussions and supports for people.

Now tell people they will get the opportunity to practice it themselves. Show next slide

### **Transition**

The next slide is an activity to have people practice the 2 Minute Drill with their partner.

**Purpose:**

- ✓ To learn how to quickly gather information that is important to the person and how to support them

**Time:** 8 minutes

**Workbook Page:**

**2 Minute Drill**

*Imagine...*

You have just been hired by a company that prides itself in supporting its employees.

They want to know the key things that you find helpful to be a productive employee.

You want to give them an overview, a summary in 2 minutes, of what they need to know to support you successfully.

What would you say?

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No animation

**Core Concepts To Cover**

- Read the scenario
- Demonstrate for the class

**Where To Use Judgement & Creativity**

- The information you share about yourself

**Not Your Typical Responsibility**

- What people record

**Tips To Address Concept**

- Be sure you have a timer
- Provide your own example to demonstrate what you want the class to do

**Own Examples To Use**

**Questions For Debrief/Discussion**

- How did that go for you?
- What did you notice as you went through the exercise? (we want people to notice how it changed their thought process – focus only on the critical information and get rid of the rest of the things)
- How could this be useful in our work?

### **Suggested Script to Address Concepts**

Tell people they will practice this skill with their partner. Read the scenario and let people know you will time them.

Provide examples of what support might look like (ex. Let me try things and then we can debrief; I need time to process things before I act/respond; I don't need to be micromanaged; I am pretty self-sufficient, when I come to you with a question it is because I need help; a flexible schedule helps me be the most productive; etc.)

Each partner will have 2 minutes to share what supports they need to be the best employee possible for this company. The information that is learned can be added to the support section of their one-page profile.

Tell people to decide who will be the focus person. Look at your timer and start the 2 minutes and at the end of the 2 minutes ask them to switch roles.

Debrief after both partners have had the opportunity to share. How did the experience go? What did they notice by having a short amount of time? Did they learn helpful information about their partners? How could this be helpful in their work?

Let people know when actually using this skill it can last longer than 2 minutes. However, by framing it in this manner it gets people to think differently.

Also remind people that this cannot be the only information gathering they do because they would be missing the Important To information.

### **Transition**

Participants will now work on their own Important To / Important For information. This, along with the 2-minute drill information will later be used to create a one-page profile for themselves.



### **Suggested Script to Address Concepts**

Explain the activity while the first slide is up.

Instruct people to be as specific as possible so that if someone else were to read it, they would know what is meant. Make sure that your own example is very detailed.

Put up your personal example.

You can provide additional examples:

- The things you need to do to be a valued employee i.e. getting to work on time, writing my notes. To be a better Supported Independent Living worker, I need to learn how to cook so that I can help the person have more meal options, complete reports on time. I need to tone down my energy level when supporting Joan because she has better days when people around her are calm, etc.
- The things you need to do to make a valuable contribution i.e. I need to share my opinions and suggestions more. I need to identify my concerns in a constructive manner rather than complain about it to my co-workers. Gerry is on every committee and is getting over-extended. I need to offer help or volunteer for a committee, so the work is fairly distributed, etc.

At the end of the time allotted, ask the group for a few examples. Ask them what was easy and what was difficult about this activity.

### **Transition**

Ask people to keep this work for later as it will be used again. Let them know that since important to and important for is a core concept, you will be doing a bit more work with this skill.

**Purpose:**

- ✓ To help people understand that what you look for is often what you see.

**Time:** 2 minutes

**Workbook Page:** n/a – skills chart handout

This is an awareness test...

VIDEO

**Core Concepts To Cover**

- 

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- Test the video prior to the class starting to make sure it will work
- Have someone turn the lights off/on

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

**Suggested Script to Address Concepts**

Play the video.

This is a fun way to help us realize when our attention is focused on something, we may miss what is really going on. For the rest of the class, let's look beneath the surface rather than just accepting that what we see/hear is what is really going on.

Person-Centred Thinking tools are frameworks for conversations that help us discover more or different information in a way that captures the person's perspectives as its own unique perspective

**Transition**

We will now work through a scenario.

**Purpose:**

- ✓ To practice important to / important for with a story

**Time:** 20 minutes

**Workbook Page:** Pg. 49

Harry

What is important to Harry	What is important for Harry
What else do we need to learn or know?	

Harry – Possible Answers

What is important to Harry	What is important for Harry
To attract women To spend his money as he wants To know what George thinks (his opinion)	To learn what to wear that will cause minimal pain and embarrassment To learn to manage his money
What else do we need to learn or know? What does Harry understand about – • Managing his money • Attracting women, dating • Where it is appropriate to wear what	

2 slides

**Core Concepts To Cover**

- Review story
- Remind to always start with what we know and to avoid problem solving

**Where To Use Judgement & Creativity**

- How you share the story (telling it, handing it out, etc.)

**Not Your Typical Responsibility**

- To give people the answers

**Tips To Address Concept**

- Ask the group to work with their tables

**Own Examples To Use**

**Questions For Debrief/Discussion**

- When reviewing answers with the group, point out that more information gathering needs to happen to answer the questions under the 'what else do you need to know/learn' heading before you can look at what George's role/responsibilities were to Harry in the situation. We often jump to opinions about solutions/next steps but sometimes get it wrong because we did not gather enough information first.

### **Suggested Script to Address Concepts**

Tell the story with the class and then have them work in groups to identify what Important To/For information they can obtain and what else they need to learn or know. Point out this question and tell people that this is part of this tool/skill and often forgotten.

Ask the group for their answer in each section. If answers don't seem to be right, ask the person/table to provide more explanation for their answer and provide guidance if they are confusing important to/for or if they are being too prescriptive in the important for section. There might be many ways to address important for items so make sure that the groups are not giving narrow solutions instead of identifying health, safety or being valued types of concerns.

Review the answer slide with the group. These are the answers that Harry's support team came up with.

You can also use Bob's story and slides instead of Harry's story. If so, you will need hide Harry's slides and un-hide Bob's slides.

### **Transition**

Now that the group has had a chance to sort information, have them fill out the skills chart.

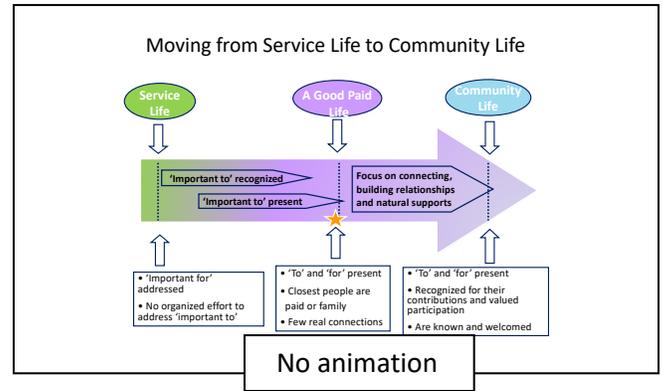
The next thing we will look at is our role in people's lives. Why do services exist? What are our responsibilities?

**Purpose:**

- ✓ To provide a frame of reference on how the system is evolving

**Time:** 5 Minutes

**Workbook Page:** 2



**Core Concepts To Cover**

- Review each component of the arrow
- Provide examples for each area

**Where To Use Judgement & Creativity**

- Examples that are used to strengthen the concepts

**Not Your Typical Responsibility**

- To get in lengthy discussions – there is no time for that in the 2-day version of the curriculum

**Tips To Address Concept**

- This can take 5 minutes as a demonstration or 20+ minutes with discussion. With a small group you can draw the arrow on the wall and then give them dots or stickers or use markers to indicate where the people that they support are. Take a digital picture and this will give the group a baseline of where they are. With a larger group – have participants discuss at their tables – “where are the people you support on this continuum?”

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Use the script below to talk people through the descriptions of Service Life Good Paid Life and Community Life.

- The required minimum standard is “service life”: issues of health and safety are adequately addressed. The presence of what is “important to” depends on who supports you, on how much they care about you – it is random and unpredictable.
- How many of you have done direct support? (raise hands) How many of you have worked with someone you deeply cared about? You knew what made that person really happy, and you made those things happen. But eventually you moved on and were no longer in that person’s life.
- How many of you have worked with someone who rubbed your fur the wrong way? You weren’t happy and they weren’t happy. You did what it took to keep that person healthy and safe.
- But truly achieving the balance of happy and safe requires a relationship.
- Examples include being in the hospital and feeling like you are a bed or number. Some people ‘choose’ to be homeless because on the street, they have community. Some fear that getting services or ‘going into service’ means that they will have a service life and they will lose their relationships.
- A good but Paid Life is not a bad place to be. Most (maybe 80%) of what is important to you is present, you are healthy and safe. But if we look at who is close to you; they are either family, other people who use services, or people who are paid. You go to places in the community where you are welcomed, you have some community presence. But real community connections are lacking. What you have is fragile in that you are dependent on the ongoing commitment of the organization and staff that supports you.
- Community Life has been our goal for the past 30 years. Community Life is defined by relationships. When you are here you may still have people who are paid in key roles, but those who watch out for you and plan with you are mostly unpaid. You are not just present but participating. Your gifts are recognized and there are opportunities for you to make a contribution.
- Have you seen the “mother duck tour” of Wal Mart? The van pulls up and a group follows the staff up and down the aisles. People don’t approach groups of people. You’ve probably seen the groups of people who show up at the McDonalds and sit in the corner while the staff goes up to the counter to order for everyone. This is presence but not participation, this isn’t community life.
- If we think about where people are on this continuum, our goal is to help them move toward community life. We know how to do it one person at a time, but not how to do it for large numbers of people. This training will help. But we also need to look at the right-hand side of the arrow – we know how to help everyone have a *good paid life*. *A Good Paid Life should be the new place we start from. This training will give you some of the key components to accomplish this.*
- *Where are the people you support? If you work with a few people, make an X for each. If you work with a lot of people think about it as a distribution curve and make an X where the middle would be.*

### **Transition**

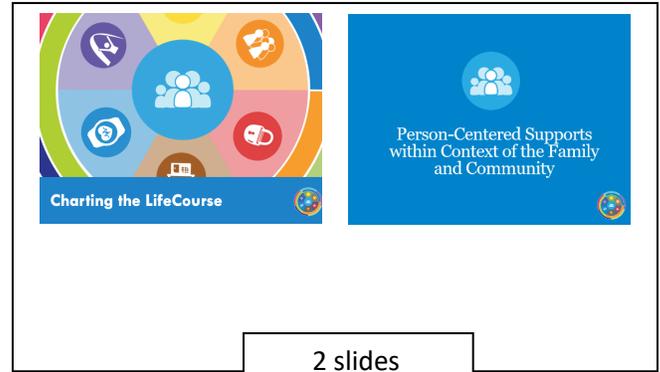
The next slide introduces the Life Trajectory (from the University of Missouri/Kansas City LifeCourse work) and how it provides a structure to make the arrow become a reality.

**Purpose:**

- ✓ Introduce participants to another planning tool.
- ✓ To explain to participants that planning for the person within the context of family does not mean that you can't have family involvement and still be person centered.

**Time:** 3 minutes + 2 minutes

**Workbook Page:**



**Core Concepts To Cover**

- The origin of Charting the LifeCourse
- The concept of planning with people within the context of their families hasn't been a concept that systems have embraced in the past. This concept challenges us to think and plan differently.
- The Charting the LifeCourse strategy encourages us to plan in partnership with the person.

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- To train others on Charting the LifeCourse Framework

**Tips To Address Concept**

- Visit UMKC Life Course website to read more about Life Trajectory:  
<http://www.lifecoursetools.com/>

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

## Suggested Script to Address Concepts

### **Slide 1**

The Charting the LifeCourse Framework was created by families to help individuals and families of all abilities and all ages develop a vision for a good life.

The Charting the LifeCourse Framework supports the core belief that ALL people and their families have the right to live, love, work and play and pursue their life aspirations in their communities.

The Charting the LifeCourse Framework can be applied to any situation, in any setting and used by ALL people.

Charting the LifeCourse Framework assists people and their families in planning and creating a vision for the future. It is designed to help people think about the questions to ask as well as the choices and options to consider as they plot a course to a full and meaningful life. It is intended to be a starting point no matter where a person is in their life journey.

### **Slide 2**

This is not..... Family involvement VS person centered. Sometimes people get the impression that we have to do one or the other -- plan with the person or plan for the person -- with the family.

**Family Engagement** is a component of a holistic approach to person centered supports that recognizes the context and impact of the family in practice and policy implementation.

The focus is on the “person with a disability”

This does NOT mean that “Family Engagement” supersedes the INDIVIDUAL

***It is not your responsibility to debate this point with your audience. The Charting the LifeCourse Training addresses this topic on a deeper level.***

## Transition

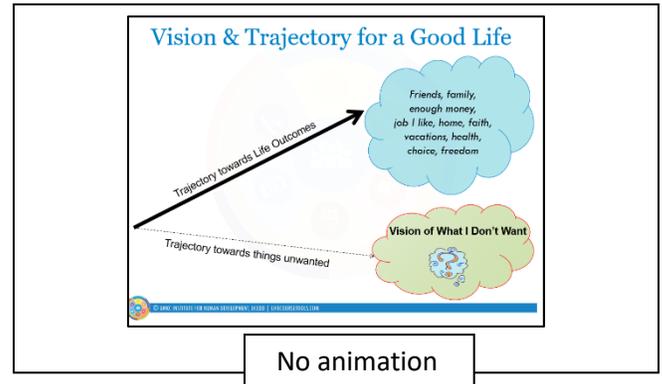
The next slide introduces the Trajectory, one of the two primary planning tools that make up the Charting the LifeCourse Framework.

**Purpose:**

- ✓ To give participants information about the Charting the LifeCourse Trajectory at a very high level.

**Time:** 4 minutes

**Workbook Page:**



**Core Concepts To Cover**

- The Trajectory is helpful in supporting individuals, families and professionals to have different conversations and it helps us to focus on outcomes and what a person wants currently and into the future.

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- To train your audience on Charting the LifeCourse Framework. You're giving participants a very high-level look at the Trajectory.

**Tips To Address Concept**

- It's important to note that our trajectory is not always straight. There will be bumps in the road as we move toward our good life. Our role is to always think about how to help keep people on their life trajectory and help people to get back on it, if they are off.

**Own Examples To Use**

**Questions For Debrief/Discussion**

- What types of things would need to be present for you to feel you were living your good life?
- What types of things wouldn't you want happening in your life? What would make you feel as if your arrow was headed down?

### **Suggested Script to Address Concepts**

What you're looking at now is another tool that is especially helpful in assisting us in capturing information that people and their families might share with us during our interactions with them.

A trajectory helps us in determining life outcomes and a vision for a good life. It helps us balance decision-making based upon what we want or what we don't want – short term and long term. Plotting out our trajectory can help us stay on our path to a good life.

The trajectory also helps us see the long-term consequences of life experiences. It helps us with advocating and identifying why we want or need certain things in our lives.

### **Transition**

The next set of slides show examples of some of what we've heard from

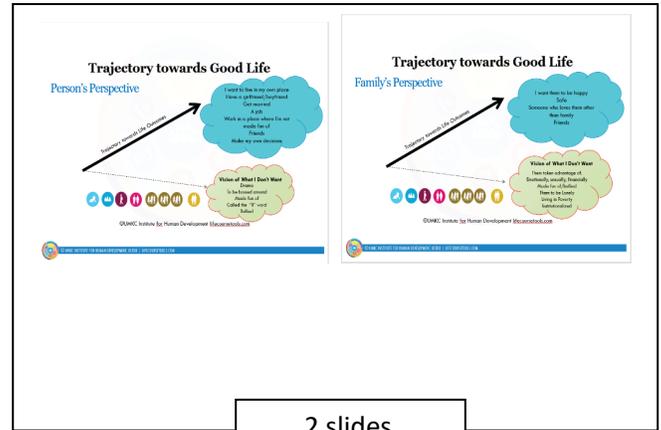
- self-advocates when we've supported them in completing their trajectory.
- families when we've supported them in completing a trajectory about someone they love and care about.

**Purpose:**

- ✓ To share an example of how people with disabilities are using the Charting the LifeCourse Trajectory and some of the information we've discovered.
- ✓ Share what we hear from families when they're asked to complete a Trajectory for someone they love and care about.

**Time:** 2 minutes + 2 minutes

**Workbook Page:**



2 slides

**Core Concepts To Cover**

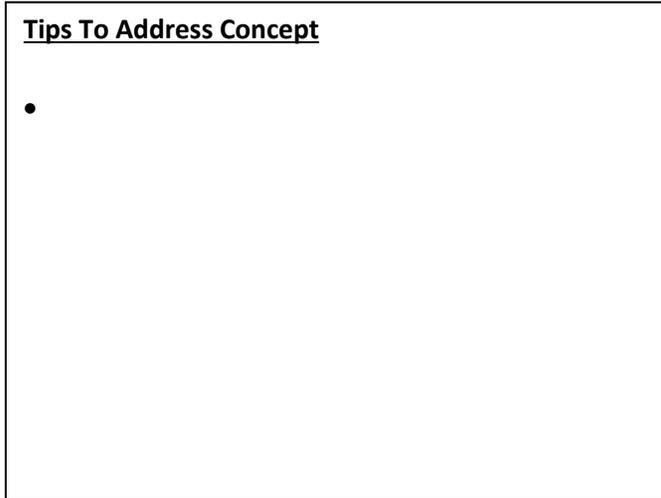
- The Trajectory is another planning tool that can help us in discovering information.

**Where To Use Judgement & Creativity**

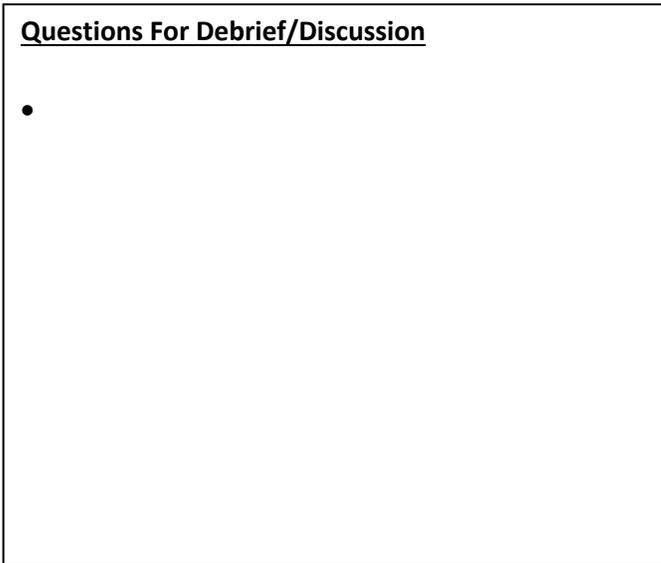
- 

**Not Your Typical Responsibility**

- To train your audience on Charting the LifeCourse Framework.



**Own Examples To Use**



## Suggested Script to Address Concepts

### **Slide 1**

*When we ask people with disabilities to describe or tell us what their vision of a Good Life is, they tell us.....*

- I want to live in my own place
- Have a girlfriend/boyfriend
- Get married
- A job
- Work in a place where I'm not made fun of
- Friends
- Make my own decisions

*When we ask people with disabilities to describe what they don't want, they've told us.....*

Drama

- To be bossed around
- Made fun of
- Called the "R" word
- Bullied

### **Slide 2**

When we've asked family members to describe or tell us what their vision of a Good Life is, this is what they tell us..... **(review the information on the slide)**

When we've asked family members to describe what they don't want, they've told us..... **(review the information on the slide)**

## Transition

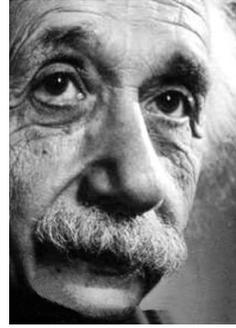
We are now ready to look at a tool/skill that will help us clarify our responsibilities in supporting people.

**Purpose:**

- ✓ To elaborate the point that understanding the issues should come before you do problem solving

**Time:** 2 minutes

**Workbook Page:** Pg. 13



"If I had an hour to save the world, I'd spend 55 minutes defining the problem."

No animation

**Core Concepts To Cover**

- To help people recognize the fixing compulsion of human services
- To recognize we need to focus on information before solutions

**Where To Use Judgement & Creativity**

- How to make the points so people understand

**Not Your Typical Responsibility**

- To resolve the fixing compulsion

**Tips To Address Concept**

- You will find that the compulsion to "fix" is so strong in many of the participants that they will keep engaging in problem solving before they complete recording what they know using the to/for analysis. Keep an eye out for people doing that and remind them of this slide.

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### Suggested Script to Address Concepts

Part of why we ask people to learn to do this important to/important for analysis is to give them a structured way to stop and think. The 'to/for' analysis is a way to ask what we know before we try to address issues/solve problems. In places where it feels like there is never enough time and there is always a crisis, stopping to think is not a luxury, it is critical.

This is part of how we can make the decisions that avoid the crises.

We tend to have a "fixing" compulsion -

- that gets in the way of critical thinking
- results in solutions that are not creative

If we spend enough time understanding an issue – we increase our chances of coming up with a solution – and a good one. ***It starts with the right conversation.***

### Transition

We are now ready to look at a tool/skill that will help us clarify our responsibilities in supporting people.

**Purpose:**

- ✓ To give people a framework for thinking through their roles and responsibilities in specific situations.

**Time:** 5 minutes

**Workbook Page:** 3

**Core Concepts To Cover**

- Core Responsibilities, Judgement & Creativity, Not Our Usual Responsibility, Dotted Line definitions
- Credit to Charles Handy
- Examples

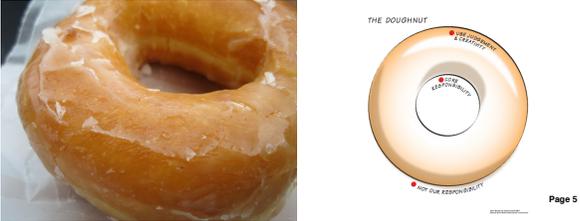
**Where To Use Judgement & Creativity**

- Example to increase understanding

**Not Your Typical Responsibility**

- 

**Own Examples To Use**



2 slides

**Tips To Address Concept**

- The first slide is a fun transition slide. Tell people that you will now be focusing on the doughnut.
- Put the second slide up when explaining the doughnut.
- Although this is one of the skills that people struggle most with, don't tell them this. Simply give good examples and help people through the activities.

**Questions For Debrief/Discussion**

- Connect the dots for people – the service system and organizations identify self-determination and inclusion as being their main purpose / core responsibility. The life trajectory / community life should always guide us in determining our core responsibilities within service organizations.

### **Suggested Script to Address Concepts**

This slide is used to introduce the doughnut. The idea is from English management consultant Charles Handy who wrote a chapter on the “doughnut principle” in a book published in the U.S. as the “Age of paradox”.

Explain each section

- Core - the things you are expected to get right without error, those areas where you are expected to make an effort or else get in trouble
- Judgment and Creativity, things you can try but get wrong – areas where you are learning what works/doesn't work.
- Not our Usual Responsibility - those parts of a person's life that you should “keep your nose out of”; things that go beyond what we should ask of you as a paid support person
- Sometimes, things may move from not our paid responsibility back into the area where we are responsible (and vice versa), e.g. we need to intervene if someone is putting themselves or others in imminent risk.

Provide an example – here is a sample:

Let's think about Carl. He is someone who would continually get evicted because of not taking care of his place and having “friends” staying there that were not on the lease. We have a Core Responsibility to help him not get evicted. The approaches we take to make that happen is where we can use Judgement & Creativity – ask the class for ideas on how we could do that. It is Not Our Typical Responsibility if we try all those ideas and he decides not to follow through with any of them and he once again gets evicted. Now this doesn't mean we don't stop trying.

It is Not Our Typical Responsibility to determine who Carl's friends are. But if we happen to notice that those friends show up every time it's pay day or grocery shopping day and when all the money and food is gone the friends are gone, do we have a responsibility to be involved? Why? (don't want him to be exploited)

### **Transition**

Let's go back to Harry's story. You gathered great information about what is important to and for Harry in the story about the t-shirt. Let's now look at what George's responsibility was in that moment.

**Purpose:**

- ✓ To practice the doughnut sort

**Time:** 15 minutes

**Workbook Page:**

Harry – George's doughnut			Harry – George's doughnut		
Core responsibilities	Use judgment and creativity	Not our paid responsibility	Core responsibilities	Use judgment and creativity	Not usually our responsibility
			To help Harry make an informed choice – About the shirt About his money It starts with asking why he wants the shirt	What you do try to help Harry make an informed choice about – The odds against the shirt being a "chick magnet" Spending 1/3 his money for 2 weeks on 1 purchase	Whether or not he buys the shirt.

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2 slides

**Core Concepts To Cover**

- Make sure people pull out their important to/for info from the Harry story.
- Before looking at responsibilities, we first need to know what is important to/for someone and see if we need to learn/know anything else before looking at next steps.

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- To give people the answers

**Tips To Address Concept**

- Have the first slide up and give instructions for the activity
- Have people share their answers
- Then put up the answer slide and compare with the group's answers.

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Note that we always start with important to/for information and this informs the discussion about core responsibilities.

Ask them to only reflect on Harry's situation but more specifically, George in the tee shirt shop – not to try and do a general doughnut, do one specific to the situation.

The process is the same – wander around and help, wait for about 80% of the participants to be done. Ask for some answers, then show the answer slide, have a brief discussion. If people have good answers that are new, note them and move on. If someone has a strongly held opinion where they understand the categories but came to different conclusions use it as a teaching moment. Let people know that reasonable people can disagree. What this provides is a structure for a conversation and a way for those doing the work to have clarity about the expectations.

George's biggest mistake – he didn't ask why...we can't help people make an informed choice if we don't understand why they're making the choice.

Ask people – is there a less painful way to learn other than natural consequences?

#### **TIPS:**

Ask the participants if they noticed there are no health and safety issues in this story – this is deliberate. We want people to see how it works when there are no health and safety issues.

Let people know that you are asking people to practice these exercises a few more times so that they get comfortable with the doughnut. It is a skill and SKILLS need structured practice with feedback.

### **Transition**

**Purpose:**

- ✓ To provide one more opportunity for practice with important to/for and the doughnut

**Time:** 15 minutes

**Workbook Page:**

Harry #2 – new information

What is important to Harry	What is important for Harry
What else do we need to learn or know?	

Harry #2 – add new information

What is important to Harry	What is important for Harry
To be around this woman, have her "recognize" that she wants him. To have control and power over her.	To know the legal consequences of stalking To stop stalking To understand that stalking doesn't work to get an intimate relationship.
What else do we need to learn or know? More about the past history of this or similar behaviour? How dangerous is he? Does he get what we think he gets out of stalking? Has he ever had a "regular adult" relationship?	

2 slides

**Core Concepts To Cover**

- Remind people that with any new information, we need to first look at important to/for and what else we need to learn/know before looking at the doughnut.

**Where To Use Judgement & Creativity**

- How you share part 2 of Harry's story (read it, hand it out, etc.)
- You can do this quickly as a large group discussion

**Not Your Typical Responsibility**

- To give people the answers

**Tips To Address Concept**

- Share part 2 of the story.
- Ask people to work through the new important to/for and what else they need to learn/know
- Compare the group's answers with the answer slide

**Own Examples To Use**

**Questions For Debrief/Discussion**

- If most participants are direct support professionals, ask them to imagine that they are the ED or ask them what they think that role would need to consider in this situation.

**Suggested Script to Address Concepts**

Just let your audience take a minute to read over the slide and absorb the differences between it and the first one you covered.

These are possible answers. Other reasonable answers are possible but be clear to gently guide/correct people if their answers are way off i.e. an important for is identified as an important to, or answers that are not supported by the info provided – these should be under what else we need to learn/know

**Transition**

**Purpose:**

- ✓ To practice the doughnut one more time

**Time:** 5 - 20 minutes

**Workbook Page:**

Harry #2 – Executive Director’s doughnut

Core responsibilities	Use judgment and creativity	Not our paid responsibility
-----------------------	-----------------------------	-----------------------------

Harry #2 – Executive Director’s doughnut

Core responsibilities	Use judgment and creativity	Not usually our responsibility
Short term - Keep the woman safe and in the process keep him safe (and out of jail)	Short term - How you keep the woman safe until you can get him treatment	To help him get sex or keep him out of jail at all costs
Longer term - teach relationship SKILLS, figure out why he is stalking, any pattern, and deal with it, seeking a way for Harry to live safely in the community	Longer term - how you learn, acting on what you learn, figuring out how he can get what is important enough to him that that he will participate in treatment	

2 slides

**Core Concepts To Cover**

- We all have different responsibilities. They are being asked to put themselves in the Executive Director’s shoes for this activity.

**Where To Use Judgement & Creativity**

- This can be walked through fairly quickly with the group as a whole or as a group/table activity like the previous activity.

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- Work through the blank doughnut as a full group or have them work in groups to look at the doughnut for the Executive Director of the agency that supports Harry.
- Remind them that they have a responsibility for Harry as well as the employee.

**Own Examples To Use**

**Questions For Debrief/Discussion**

- Depending on the answers given by the group, the following are points to make (see script for more details):
  - Need to support employees too
  - Employees have rights
  - Our need to protect can be overprotective and lead to a lifetime of restrictions (typical due process might have been less restrictive)

### **Suggested Script to Address Concepts**

The Harry 2 story often leads into discussions about what is required by law (right to privacy, employee rights, etc.); what is good clinical practice; and what do the values of the participants say that they should do. There is often some conflict between those who strongly hold to each of these perspectives.

Point out that the doughnut gives a framework to surface the issues and have a rational discussion but does not automatically give answers. One of the important things that it does when it is completed is give those who are doing the day to day work clarity about expectations.

Remind people that Harry's stalking is not about getting sex; it's about gaining power/control over the woman with whom he is obsessed. Unpaid responsibility dilemma: let people know going to jail for stalking is better than going to jail for assault or rape.

We also have an obligation to the woman who is on our staff AND the community in which Harry lives, but this cannot be at Harry's expense. Putting 24 hours supervision indefinitely on him would be more restrictive than being charged and convicted of stalking. Many of us know people who have had restrictions placed on them and these end up staying in place for years, sometimes a lifetime – services sometimes take the role of judge and jury which is not proper due process.

#### **TIPS:**

Don't spend a lot of unnecessary time here. Most audiences are not prepared to work through the doughnut in this situation (unless they have administrative experience and/or background). You just want to illustrate the fact that Important To/For sort and the accompanying doughnut can change based on new information or new circumstances.

If you have a group that is mostly made up of supervisory and management staff, you can do this exercise as a full exercise as with the previous part.

### **Transition**

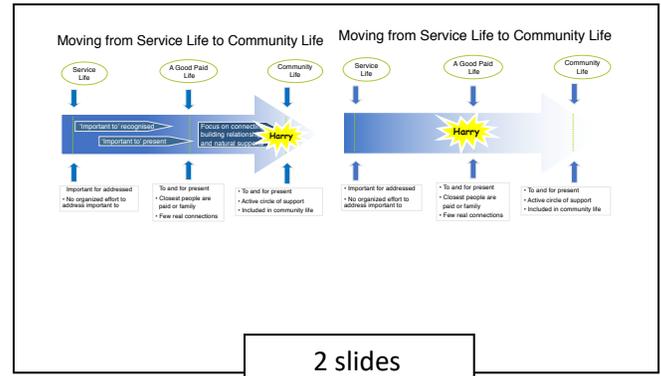
The next slides are to demonstrate how the service/support decisions we make can have an impact on people's lives.

**Purpose:**

To demonstrate how the service/support decisions we make can have an impact on people’s lives.

**Time:** 1 minute

**Workbook Page:**



**Core Concepts To Cover**

- That our actions as service providers can sometimes be contrary to our main purpose and can have a negative impact on people’s lives

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- If you decided to use Bob’s story instead of Harry’s story, change the name on this slide from Harry to Bob.

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### Suggested Script to Address Concepts

#### **Slide 1**

Remind participants of the Service Life to Community Life continuum. How would the proposed actions suggested by the group for Harry, Bob or personal stories affect where the person is on the continuum?

Ask if this is a helpful way to think about proposed actions in their work.

#### **Slide 2**

**Harry** – if you start imposing 24hrs/day supervision, taking his phone away, etc. – Harry would move from a community life to a paid life.

**Bob** – In the real-life situation, the case manager panicked and reacted without thinking through the process. She contacted the prescribing physician, who reacted with anger that Bob was not following his orders. A meeting was held, Bob was scolded and put on a behavior plan.

Point to where the behavior plan put Bob on the continuum.

In actuality, Bob quit services, quit taking his meds, cycled and became suicidal. His girlfriend was the one who knew what to do and got him into the hospital, she saved his life. After discharge from the hospital he got a new team, including a new physician. The new physician said drinking 2 beers over several hours while taking the prescribed medication was not an issue. In Bob's real life, the 2 beers were not the issue – stopping the medication and risking triggering a cycle was the issue.

### Transition

**Purpose:**

- ✓ To give your audience a high-level overview of the Integrated Support Star

**Time:** 4 minutes

**Workbook Page:** 4

Integrated Support Star

What We Want To See...

The diagram consists of two parts. On the left, three concentric circles represent the levels of support: an innermost circle labeled 'PERSON', a middle ring labeled 'FAMILY', and an outermost ring labeled 'COMMUNITY'. Below these circles is the text '100%'. On the right, a star-shaped diagram is divided into six segments, each representing a category of support: 'Personal Strengths & Assets' (resources, skills, abilities), 'Relationships' (family, friends, neighbors, co-workers, church members, community members), 'Eligibility Specific' (SHS services, Special Ed, Medicaid, Voc Rehab, Food Stamps, Section 8), 'Community Based' (school, businesses, church faith based, parks & rec, public transportation), 'Adaptive equipment', and 'Technology' (laptop, computer, smart phone apps, remote monitoring, cognitive accessibility). A small logo at the bottom left reads 'LIFE COURSE TOOLS FOR HUMAN DEVELOPMENT'. A box at the bottom right contains the text 'No animation'.

**Core Concepts To Cover**

- A shift in thinking and conversations by encouraging individuals and their families to think about all areas of the Integrated Support Star when planning. Rather than relying only on eligibility specific supports.

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- To train participants on how to use an Integrated Support Star.

**Tips To Address Concept**

- Visit the LifeCourse website [www.lifecoursetools.com](http://www.lifecoursetools.com)

**Own Examples To Use**

**Questions For Debrief/Discussion**

### Suggested Script to Address Concepts

The second principle that we want to share with you is the Integrated Support Star. In the past, conversations about supporting people with disabilities and their families mainly revolved around the supports offered by the disability service system. We are trying to help families as well as organizations and policymakers understand that we ALL access a variety of supports to make it through our daily lives.

We ALL do this routinely without thinking about it. We automatically brainstorm about other supports that are available to us.

- **Personal Strengths & Assets** - What can we do on our own? What do we bring to the table? What do we want to learn or could learn?
- **Technology** - Is there some type of technology available that can help us?
- **Relationships** - Who do we know that might be able help?
- **Community Based** - Where can we get support just like anyone else does - within our own community?
- And we also use **eligibility specific** supports.

What we WANT to get to is the circles on the left, where we all exist in the context of our families and communities. And where the person receives lots of different kinds of supports, represented by the stars. But only where and when supports are needed. This should happen regardless of whether or not a person is eligible for paid supports. We want to encourage individuals and their families to think about all areas of the Integrated Support Star when planning.

It's something we all do. This is how we get the supports needed for a GOOD LIFE!!

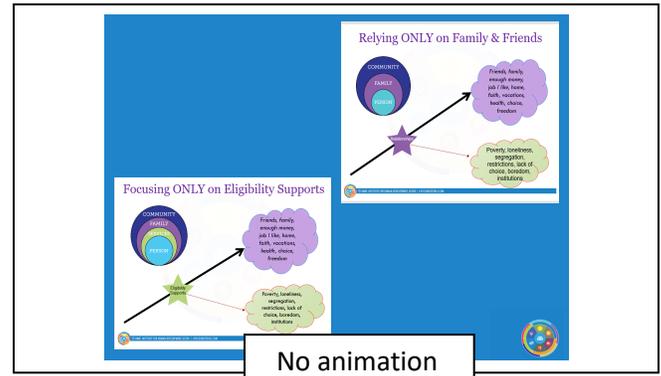
### Transition

**Purpose:**

- ✓ To provide two examples of an unbalanced approach to supports

**Time:** 3 minutes

**Workbook Page:**



**Core Concepts To Cover**

- First example is what can happen when we rely only on family and friends to provide support.
- Second example is when we only focus on “Eligibility” supports

**Where To Use Judgement & Creativity**

- You can link this concept back to Important TO and Important FOR.
- What happens when we focus all our efforts on Important For?

**Not Your Typical Responsibility**

- To train your audience on Charting the LifeCourse Framework.

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

- What did you notice as you completed your Integrated Star?
- How would this compare to someone using services?

**Suggested Script to Address Concepts**

We shouldn't put all of our eggs in one basket, nor should we rely on just one part of the star.

For example, if all the reliance is on the family to support the trajectory to the good life vision the person nor their family has rich fulfilling lives. We should also think about...what if the family is no longer in the picture or no longer able to provide support?

Only relying on paid services to get a person their good life doesn't work either. Think about what a totally - service life would do to a person's trajectory. It would give them a paid life. Maybe a good paid life, but a paid life none the less.

**Transition**

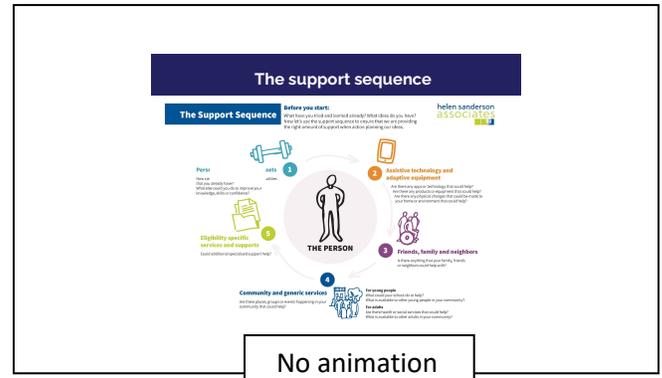
The next 2 slides are just to show as examples of how the information can be incorporated into a schedule for someone and will be reviewed quickly

**Purpose:**

- ✓ To highlight what order to use when exploring support options.

**Time:** 2 minutes

**Workbook Page:** 5



No animation

**Core Concepts To Cover**

- We should always go from step 1 in order to step 5 when exploring services.
- This is the same as the integrated support star but puts it in order to explore

**Where To Use Judgement & Creativity**

- Which example you use to walk through the 5 steps.

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- The Support Sequence helps us look at supports starting with the least intrusive and most natural supports first.

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

**Suggested Script to Address Concepts**

We often tend to go to paid services/hours as the first option for supports. We need to flip this on its head and look at most inclusive options and options that promote self-determination first, other community options then and finally, eligibility services.

**Transition**

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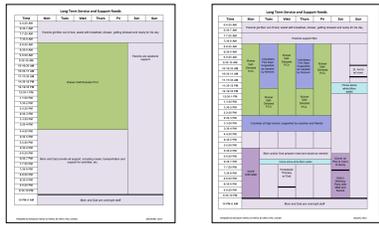
**Purpose:**

- ✓ To illustrate how the Integrated Support Star can be used to coordinate/expand supports and services

**Time:** 2 minutes

**Workbook Page:**

Ben's Integrated Supports



No animation

**Core Concepts To Cover**

- Point out domain colors on the schedule
- Before and after comparison

**Where To Use Judgement & Creativity**

- How you frame the change for Ben

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Ben is someone who lives with his family and receives Family Support Services. Notice on the left what his life was like before using the Integrated Support Star. After the Star, see what other resources are available to him.

Ben's parents were very intentional in using the integrated support star to look at other types of supports. They wanted Ben to be more independent and have more connections. Another thing to share with participants is that they should notice that Ben's "paid services" weren't reduced. Ben and his family just used his services differently in order to make them work better for Ben and the family. Telling folks this helps them to understand that using Charting the LifeCourse doesn't mean we're going to cut or reduce "paid system services."

### **Transition**

The next slide shows a weekly schedule broken down by available resources. And how this can fit into a weekly schedule (go to next slide).



**Suggested Script to Address Concepts**

Here is what happens when we look beyond system resources. What do you think?

**Transition**

**Purpose:**

- ✓ To provide people with details on how to find out more about Charting the LifeCourse Framework and Tools

**Time:** 2 minutes

**Workbook Page:**

**Core Concepts To Cover**

- Let participants know that if they sign-up to receive a follow-up email, they will receive links to these resources.

**Where To Use Judgement & Creativity**

- 

**Not Your Typical Responsibility**

- 

**Own Examples To Use**

**Charting the LifeCourse Resources:**

- Find CtLC webinars, resources and tools on [lifecoursetools.org](http://lifecoursetools.org)
- Learn from others who are using CtLC on the **Facebook Group: Charting the LifeCourse in Action**
- Follow the latest updates or opportunities on the **Facebook page: lifecoursetools.com**
- Attend the **Annual Charting the LifeCourse Showcase** for 2 days of learning and sharing in Kansas City, MO
- Connect with your state **Community of Practice on Supporting Families team** [supportstofamilies.org](http://supportstofamilies.org)
- Contact [umkcCtLC@umkc.edu](mailto:umkcCtLC@umkc.edu) for more information.

**Charting the LifeCourse Framework and Tools**



[lifecoursetools.com](http://lifecoursetools.com)



No animation

**Tips To Address Concept**

- 

**Questions For Debrief/Discussion**

**Suggested Script to Address Concepts**

**Transition**

The next slide continues the Change conversation. The next slide is a quick transition slide.

**Purpose:**

- ✓ To define Change Agents and Change Targets over the next 3 slides

**Time:** 3 minutes

**Workbook Page:**

**Core Concepts To Cover**

- Change agents are motivated for and advocate for change but don't change themselves.
- Change is harder when it means WE have to change!
- 

**Where To Use Judgement & Creativity**

- Provide an example of when you have been a change agent

**Not Your Typical Responsibility**

- 

**Own Examples To Use**

**Change Agents AND Change Targets**



No animation

**Tips To Address Concept**

- Change agent – talk the talk but don't necessarily walk the walk
- Change target – we need to change our actions and not just advocate for change

**Questions For Debrief/Discussion**

### **Suggested Script to Address Concepts**

#### **Change agent**

We often see the need for change and encourage others to make needed changes. If we do this and don't change anything we do, we are known as Change Agent. We talk the talk but don't walk the talk. We have all had experience with people who do this.

#### **Change target**

Change is hard and as our system evolves it requires us to have and use a different skill set. We know skills must be practiced in order to become good with them. We must become a Change Target and walk the talk. It will require us to change our habits, how we respond to things, how we interact with others.

**Debrief** - Some questions might include:

- Where do you see opportunities to do our work differently? How will people develop the skills to accomplish this?
- Where do you see challenges in making this happen? How can they be addressed?
- Where do you see yourself in accomplishing the changes?

This can be done as a Time Talk at tables, or you can have partners share with each other. This should be done in 3-5 minutes depending on the size of the group talking.

### **Transition**

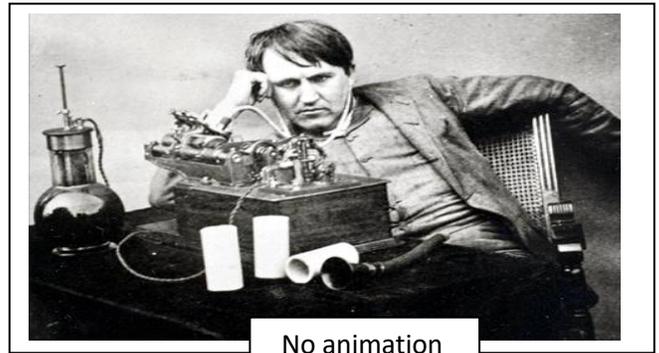
The next slide continues the Change conversation. The next slide is a quick transition slide.

**Purpose:**

- ✓ To set the stage for conversations on Discontent
- ✓ To help people transition from thinking about where they want to go to identify the precondition to get there

**Time:** 30 seconds

**Workbook Page:**



No animation

**Core Concepts To Cover**

- To introduce Discontent as the precursor to change

**Where To Use Judgement & Creativity**

- How/If you incorporate Thomas Edison into your discussion

**Not Your Typical Responsibility**

- To spend a lot of time on the concept of Discontent

**Tips To Address Concept**

- Put the slide up and pause while people read the slide. Then say: If you want change, you have to have discontent. Then advance to the next slide.

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief. This is an introductory slide

**Suggested Script to Address Concepts**

Put the slide up and pause while people read the slide. Then say if you want change, you have to have discontent. Then advance to the next slide.

**Transition**

The next slide provides a context on discontent and how Happy People Don't Change.

**Purpose:**

- ✓ To help participants understand what is required for change to occur
- ✓ To introduce the ideas of optimistic and cynical discontent

**Time:** 2 minutes

**Workbook Page:** Pg. 16

**Discontent** is the Engine of Change

There are **2 kinds** of discontent

- Cynical discontent
- Optimistic discontent

1 animation

**Core Concepts To Cover**

- To convey happy people don't change

**Where To Use Judgement & Creativity**

- Examples to illustrate discontent leading to change

**Not Your Typical Responsibility**

- To provide definitions of Cynical and Optimistic at this time

**Tips To Address Concept**

- The next 2 slides are connected, and it is helpful to have an example that ties the slides together. The example should incorporate the information on the slides so you don't just read the slides

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

To systematically teach ourselves to think “the purpose of our efforts is to help people get better lives”, requires change.

Changes must occur in how we think, what we pay attention to, what we do in response and what we structure into our organizations and systems to support the changes desired. Change only occurs where there is discontent. Happy people don't change.

When we develop good descriptions of how people want to live and compare that with how they are actually living, -the difference between the two that we see - and then hopefully feel- is the discontent. But there are 2 kinds of discontent – optimistic and cynical. One can be helpful, one can be destructive. It is our hope to create a sense of helpfulness with this training.

### **Transition**

The next slide provides details on Cynical Discontent

**Purpose:**

- ✓ To realize how common cynical discontent is and how it acts as an obstacle to change

**Time:** 2 minutes

**Workbook Page:**

**Cynical Discontent**

When you have discontent without hope you get cynical discontent which results in:

<b>Denial</b>	People say "this is no different from what we have always been doing"
<b>Distortion</b>	Perceptions are distorted to suggest that what people want is what they already receive
<b>Departure</b>	The people who have the most passion leave (depart) when they see no hope for change

No animation

**Core Concepts To Cover**

- To define Cynical Discontent and review the "3 D's"

**Where To Use Judgement & Creativity**

- Examples to illustrate the "3 D's"

**Not Your Typical Responsibility**

- To just read the slide

**Tips To Address Concept**

- As stated previously, use an example that can be used for both Cynical and Optimistic discontent and have different results based on how people view that discontent (optimistically or cynically)

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Cynical discontent is endemic in our work. Every time we introduce a new practice, we are also making a promise; any time we don't follow through we have broken that promise. We create and reinforce cynical discontent. You have over-promised & underdelivered.

If cynical discontent is present, you will see 1 of the 3 "Ds" – denial, distortion or departure –

- It is no different from what we have always been doing
- People are happy with what we are doing – change is not needed
- The people with passion leave

Here's an example:

Have you ever worked someplace and saw something wasn't working well? You have a solution and bring it to your supervisor, and he/she says:

I don't know what you're talking about. We don't have any problem here (denial)

Or maybe he/she says: Well everybody likes how we do this. I don't understand why you don't (distortion)

How many of you get tired of banging your head against the wall and decide to leave? (departure)

What happens to those supported if all the good people leave?

### **Transition**

The next slide is Optimistic Discontent. You will use the same example you just used for Cynical Discontent

**Purpose:**

- ✓ To see that building optimistic discontent is a critical piece of leading change

**Time:** 2 minutes

**Workbook Page:**

**Optimistic Discontent**

Requires hope based on trust that is created when there is:

- A history of acting on things that can be changed
- Honesty about those things that will take time to change
- Progress in acting on the things that take time

Where cynical discontent is dominant  
...trust must be created

1 animation

**Core Concepts To Cover**

- Each point related to Optimistic Discontent

**Where To Use Judgement & Creativity**

- Example to illustrate each point

**Not Your Typical Responsibility**

- To just read the slide

**Tips To Address Concept**

- Continue with the example used in the last slide
- Engage participants by asking how they would react to the situation presented (see script)

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief needed

### **Suggested Script to Address Concepts**

Provide an overview of the 3 points

- Optimistic discontent has to be nurtured
- it is rooted in trust and feeling empowered.
- When planning with people it is rooted in knowing that you can act on what you learn – in knowing that you can reduce the gap between how the person wants to live and how that person is actually living.
- Optimistic discontent comes when you believe change can happen.

Now, let's go back to that example, you are working someplace and have a solution to resolve an issue. This time when you take it to your supervisor you hear: That's a great idea, let's see how we can make that happen.

Ask the group, how does that make you feel? (you will get answers such as valued, a part of things, happy, etc.)

So, you are waiting for things to change but don't really see anything and start to become disillusioned. Your supervisor comes to you and says: This is taking longer than we thought, but here is where we are with things.

Ask people, How does that make you feel? (you will get positive responses).

Let people know, if we are to build optimism there needs to be communication so people continue to be informed. It builds trust (show next part of slide about building trust)

Let people know part of your role over the class is to create discontent and you hope that it will be optimistic discontent.

### **Transition**

The next slide is about 3 levels of change. Let people know discontent is what leads to change and then introduce the next slide

**Purpose:**

- ✓ To help the participants understand how change happens at different levels and is connected to each other.

**Time:** 3 minutes

**Workbook Page:**

**Core Concepts To Cover**

- To review each level of change and how they are defined
- To provide an example for each level

**Where To Use Judgement & Creativity**

- The examples used to reflect the level of change

**Not Your Typical Responsibility**

- To “fix” any issues that may be presented by the class

**Own Examples To Use**

**Levels of Change**

<b>Level 1</b>	Any change that results in a positive difference in the lives of people who use services or in your own work life.
<b>Level 2</b>	Any changes an organization makes to its practices, structure or rules that result in positive differences in the lives of people.
<b>Level 3</b>	Any change in practice, structure and rules made at the system level. These changes have an effect on many organizations, and therefore many peoples' lives.



2 slides

**Tips To Address Concept**

- Explain the first slide before working through the example of the note on the school bag. See script for this story.
- Use real life examples related to the system
- Can ask the class for examples they have seen
- Read Michael Smull’s article *The Importance of Language* to have information on a possible Level One Change

**Questions For Debrief/Discussion**

-

### Suggested Script to Address Concepts

Discontent leads to change and it is helpful to think about change as happening at several levels.

- **Level one**, you don't need any permission to implement. Changes in such things as routines, rituals, approach. These are changes that can be made immediately. *Provide a Level One Change example (ex. language is something we have control over, and do we use language that is respectful to people)*
- **Level two** changes require approval from management. It is a change in practice, policy, or structure. The need for Level two changes is best identified by having a structured way for the shared learning of direct support level go to the organization's leadership. *Provide a Level Two Change example of something that has occurred and impacted the organization (ex. changes to forms or job duties)*
- **Level three** changes can be thought of as "systemic" changes. It can apply to the rules and regulations we must follow. It can include how those rules are interpreted and the impact that has on monitoring/licensing. A change in state law or regulation is an example of a level three change. *Provide a Level Three Change example (ex. CMS Final Rule for HCBS Services)*

#### **Note on school bag example**

Take a look at this; what do we see? This is a real picture. This happened to Jordan.

Describe what they see- and correct them if they are wrong.

Can we imagine that Jordan is returning home from school on the bus?

How could this be done differently? What actions could be done at each level of change?

- level one change: asking support staff to place notes in Jordan's bag and not on the bag
- level two change: training about respect for staff, day program policy
- level three change: organizational policy, yearly training on how we share information and protect information, training on respect and organizational values

### Transition

We are now transitioning to person-centred thinking tools/skills that help people have more choice and control in the decisions in their lives. The more we understand what people are communicating and the more we understand how to support people to make decisions, the more choice and control they will have in their lives.

**Purpose:**

- ✓ to support your conversation with the group about listening to what people show you

**Time:** 3 minutes

**Workbook Page:**

**When we listen...**

- Communication becomes more complex
- People become more interested in other ways of communicating
- Some people who didn't use words to communicate start doing so

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3 animations

**Core Concepts To Cover**

- Each bullet point

**Where To Use Judgement & Creativity**

- Examples to illustrate each bullet points

**Not Your Typical Responsibility**

- 

**Tips To Address Concept**

- Think about people you have supported who used behavior as a way of communicating

**Own Examples To Use**

**Questions For Debrief/Discussion**

- No debrief

**Suggested Script to Address Concepts**

Experience has shown what happens when we listen to behavior as communication:

- Communication becomes more complex – people tell us more (*provide an example*)
- People become more interested in other ways of communicating – people find better ways to let us know what they are thinking (*provide an example*)
- A few people who didn't use words before, begin to do so. – they know we care and are paying attention (*provide an example*)

**Transition**

The next slide is a blank Communication Chart and is followed by a few examples.

**Purpose:**

- ✓ To introduce and explain the communication chart (How I communicate with you)

**Time:** 3 minutes

**Workbook Page:** 6

**How I communicate with you**

What is happening	Rachel does this	We think it means	And we should
Arrival notice from cottage	Drops key in floor, slams door, storms upstairs	She has had a hard day	Leave her be she will come and talk when she is ready
In the environment	The behavior	Meaning of the behavior	What other people should do in response
What's just gone on	What others notice	What the emotions and feelings are	Or not do....
The "trigger"	Can be seen, heard, and felt by others	What's going on inside	

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2 slides

**Core Concepts To Cover**

- To review components of each column
- To demonstrate the order of completing the Communication Chart (usually start with 2<sup>nd</sup> column)
- To show how behavior can mean different things
- To show how they can be used with someone who uses words and someone who doesn't

**Where To Use Judgement & Creativity**

- Examples you use to demonstrate how behavior can mean different things

**Not Your Typical Responsibility**

- How people respond to your examples

**Tips To Address Concept**

- Use an example that is outside of the disability world so everyone can relate to it

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Read the headings and what they mean. Explain we usually start with Column 2 because when we are in the discovery phase the first thing we see/hear/feel is what someone is doing. That leads us to look at the environment and then we can figure out what it means and how to support the person. After reviewing each column provide an example using the same behavior but illustrate how it can mean different things in different environments:

1. I see you crying; 2. You're at a funeral; 3. Ask group what it means (sad); 4. Ask what they want us to do (comfort would be a wrong answer – we need to know what that means for each person so specifics matter)
  
1. I see you crying; 2. You're at your child's graduation; 3; Ask group what it means (happy); 4. Ask what they want us to do (congratulate, celebrate, high five, check for college)
  
1. I see you crying; 2. You're watching a Hallmark commercial; 3. Ask group what it means (not even going to go there!); 4. Ask what they want us to do

The last example should be something that could be misinterpreted. Not seeing the Hallmark commercial, I might misinterpret the reason you are crying. All these situations are helpful to know, but especially when we misunderstand, this can be really helpful!

As you begin the communication chart, there are a couple of things to keep in mind. First, look for easy, simple, and clear communication – e.g. Think about a time recently when you had a strong emotion. What did you do or say in response to what you were feeling? What did you mean by what you did or said? What had happened? What did you want others to do in response?

Notice in Column 4-The purpose of this column is to help us to think about how we should respond - "Given what the person is telling us, what do we want to do? What are we saying with our words or actions?"

### **Transition**

The next slide is your example of something people would see from you as you are delivering the training



### Suggested Script to Address Concepts

#### **Slide 1 (Steven)**

- After you've read the first row, ask people "how many of you would have guessed that scratching his chin meant that he has to use the toilet?" – how frustrating would it be for him if new support staff didn't know this?

#### **Slide 2 (Chuck)**

- The first two rows show the nuances in behavior and how a change of context, changes what the communication/behavior means.
- The last row is a good demonstration that information about what not to do is also important to include in the chart. Most people would try to reassure Chuck that his food is okay/safe, but this is the last thing you want to do.

Explain to people that this chart is helpful for all people and that we include them in Person-Centred Team plans.

Let people know that if they are struggling with where to start for someone who doesn't use any words to communicate, suggest that they start with emotions (happy, hurt, sad, frustrated, bored) and physical needs (hungry, tired, need to use the toilet, etc.)

### Transition

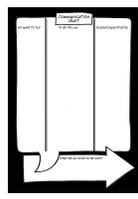
**Purpose:**

- ✓ To introduce the 2<sup>nd</sup> communication chart (how you communicate with me) and provide an example

**Time:** 3 minutes

**Workbook Page:** 7

How you communicate with me



THINGS WE NEED TO COMMUNICATE WITH KYLE		
We want to let Kyle know	To do this we	Then suggest/encourage Kyle to
☐ I want to get up if Kyle is not already ready	Show Kyle a morning routine. Say the time.	Encourage Kyle to morning routine. Say "be successful."
☐ I want to have a bath	Show Kyle when Kyle is in his bedroom and when bath is put open his door.	Kyle will get into the bath unassisted.
☐ I want to have hair washed	Show Kyle his room and showing shower.	Apply shampoo and have hair washed.
☐ I want to get dressed	Show Kyle his clothes.	To dressed by letting him know what he needs to do for complete, pointing and helping him to do it.
☐ Breakfast/lunch/dinner is ready	Show Kyle his meal. Encourage Kyle to go and sitting down.	Sit at the table and eat his meal.
☐ I want to have teeth cleaned	Show Kyle his toothbrush.	Sip his medication.
☐ I want to take medication	Show Kyle his toothbrush.	Come and sit in the kitchen and have his teeth cleaned.
☐ I want to go to the toilet	Show Kyle movement pad/fly high chair.	Walk to the bathroom by pointing and pointing him to the toilet.
☐ I want to go out	Show Kyle his boots.	Put his boots on and walk to the door.
☐ I want to go for a walk	Show Kyle put the car to the gate.	Walk or use own space.
☐ I want to go out in the car	Show Kyle the car keys or nearby the car key.	Walk to the car.
☐ I want to go to the job	Show Kyle his print job glasses.	Support Kyle to go to the job.
☐ I want to buy chocolate	Show Kyle a chocolate wrapper.	Support Kyle to step and buy chocolate.

2 slides

**Core Concepts To Cover**

- To provide a visual example of how our communication to someone can be captured when consistency is important in order for the person to understand.

**Where To Use Judgement & Creativity**

- Examples you use to demonstrate how behavior can mean different things

**Not Your Typical Responsibility**

- How people respond to your examples

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

**Suggested Script to Address Concepts**

Some people have a difficult time with receptive language and understanding spoken communication and/or sign language. Communicating something to them can be difficult.

This chart can capture what does work in terms of communicating to the person so that everyone supporting and/or spending time with the person can communicate to them.

Only read a few rows. Ask the group what they think of the two communication charts. Ask them how they think they might use them in their work.

**Transition**

In addition to communicating and being understood, decision-making tools can be instrumental in helping people have more choice and control in their lives.

**Purpose:**

- ✓ To introduce the concept of decision-making

**Time:** 3 minutes

**Workbook Page:**

**Decision Making  
Types and Processes**

- **Informed** Decision Making
- **Supported** Decision Making
- **Substitute** Decision Making

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No animation

**Core Concepts To Cover**

- To define the types of decision-making processes

**Where To Use Judgement & Creativity**

- Examples to illustrate the concepts

**Not Your Typical Responsibility**

- To get into lengthy discussions with participants
- To resolve guardianship issues that might arise

**Tips To Address Concept**

- 

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

## Suggested Script to Address Concepts

**In all of the following situations, the person needs to remain involved and their preferences included in the process.**

### **Informed decision-making**

Informed decision-making is what most people employ to arrive at a decision. Outside sources (internet), experience (I'll never do that again), and trusted advisors (talking to friends) are called upon to understand the options available, possible consequences/impacts, and reasons for a course of action. The person making the choice understands the options, outcomes, and magnitude of the choice.

### **Supported decision-making**

Supported decision-making is a process in which adults who need assistance with decision-making – for instance, some people with intellectual or developmental disabilities (I/DD) – receive the help they need and want to understand the situations and choices they face, so they can make life decisions for themselves, without the need for undue or overbroad guardianship. To ensure the person making the decision understands the options and likely outcomes of that decision, ask the person to describe the options and possible outcomes back in their own words. This may need to happen multiple times or with practice and repetition. Often a limited frame of life experience can narrow the choices a person is comfortable with. In supported decision-making, it is the role of the supporter to ensure as much information as possible is present.

### **Substitute decision-making**

Substitute decision-making, guardianship, or surrogacy place the decisions about a person firmly in the hands of another. **It is important to remember that if the person is competent, then the substitute decision-maker does not have a role.**

This appointment can be legal (court appointed, parents, power of attorney) or identified to make decisions on behalf of a person whose decision-making capability is impaired. This can be a person selected by the decision-maker to act in their best interest and in alignment with their identified values, if they are not able to make a decision. A legally appointed decision-maker should consider these factors as well, in fact in many places legislation support this (insert relevant country reference)

Historically, people in these roles have approached this from an “I know best” standpoint. Their role is to help the person obtain what THEY want and people in substitute decision-making roles may need support to make this shift.

### **Power of Attorney for medical or financial decisions** (in case someone asks about this)

This is predetermined by the person and only comes into effect if the person loses the ability to make their own decision (e.g. in a coma, deemed incapable by doctor).

## Transition

**Purpose:**

- ✓ To demonstrate how we are all different in terms of how we process information and make decisions

**Time:** 10-15 minutes

**Workbook Page:**

**Decision-Making**

**Spend 5 minutes at your tables sharing a significant decision in your life during the last couple of years:**

- What was the decision to be made?
- How did you consider your options?
- How were you involved & did anyone help you with the decision?
- Who made the final decision?

No animation

**Core Concepts To Cover**

- We are all different in how we approach decision-making
- The importance of learning how each person supported approaches decision-making and how to support them to make more choices in their lives

**Where To Use Judgement & Creativity**

- Examples you use

**Not Your Typical Responsibility**

- How people respond to your examples

**Tips To Address Concept**

- Provide your own example of how you make decisions and how you might be different from someone in your own life (partner, family member, friend, etc.)

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Inform participants that the next 10 minutes will be spent focusing on decision making.

Explain how they will be spending the next 5 minutes with the group at their table. Provide a personal example of a significant decision you have made in your own life then ask the group to do the exercise at their tables.

Once the group is finished...

- Ask the group what was similar at the table about how they were involved, did anyone help, and who made the final decision?
- Ask the group what was different?

For some people who may have had a lifetime of decisions made for them- they may need some support with decision-making.

Youth transitioning into adulthood have so many decisions in front of them...and big decisions. How can we help? What is our role when it comes to decision-making?

As with all things Person-centred we begin by listening and asking: What does good support look like for decision-making?

### **FACILITATION TIPS:**

#### **KEY MESSAGES:**

There is a uniqueness to each of us in how we make decisions.

Decision Making is such a fundamental part of our lives.

People who have little experience with making decisions need help and support to learn how to explore and weigh options and how they might need/want to be supported.

**\*How do we support in a way that is a 'power with' approach rather than a 'power over' approach? If people can't say no to vegetables, how can they make more significant decisions?**

### **Transition**

The next slides are examples of the decision-making profile.



### Suggested Script to Address Concepts

#### **Blank decision-making profile**

By knowing this information, we can assist and not impede people in making their own decisions and having more choice and control in their lives.

For some people they may have never considered what they need in order to make decisions. It might take some trial and error in finding out what is most helpful. It might be useful to use a learning log to capture learning when exploring and trying different ways of supporting the person.

Go to next slide to show example.

#### **Anna's example**

Ask the group as it corresponds to each section...

- Is there a better time of day for you to make decisions? Do we ask people what a good time of day is for them? Or do we work around our own schedules?
- What about how long it takes for you to make a decision or
- Who else do you want to talk to first?

Services have been guilty of asking people to make decisions on the spot, or in two-week rotations, as in “Ok so we’ll meet in two weeks to make a decision on this?”

Everyone has a different process of how they end up at their choice. We need to know, respect and support this in a person-centred way.

### Transition



### **Suggested Script to Address Concepts**

The Decision-Making Agreement helps with identifying the important decisions in someone's life, understanding how they see their role, and who makes the final decision.

Review the agreement components with participants.

Who makes the final decision can include:

- decision-making responsibility that has been given to others through due process:
  - legal guardianship
  - trusteeship
- decisions that the person has asked others to make the decision for them.

In all situations, the person must always be involved, and their opinion and preferences be honoured.

The scope of the responsibility must be clear. It is important to be cautious not to provide more support than wanted and needed.

A review of the arrangements or due process decisions should be reviewed regularly to see if they are still needed / wanted.

Adding a 4<sup>th</sup> column can be helpful: "when do I think I'll make that decision by?" This brings in discussion about the reality that some things are time sensitive while others are up to the person's discretion, and not ours.

### **Transition**

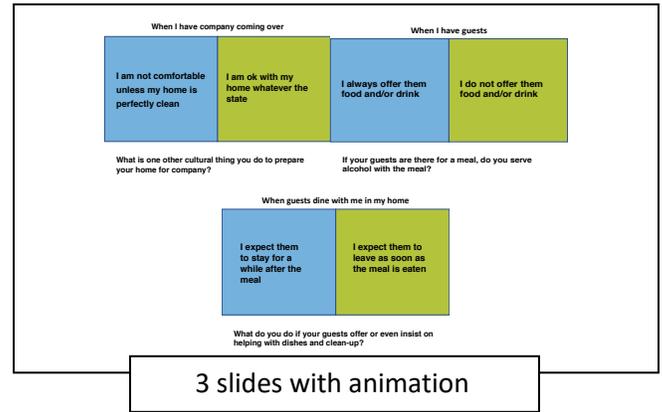
This wraps up the work for day 1. The next slides are an introduction to one-page profiles and the work we will be doing on day 2.

**Purpose:**

- ✓ Encourage learners to think about how cultural differences exist in everyday living preferences

**Time:** 15 minutes

**Workbook Page:**



**Core Concepts To Cover**

- To look at how our experiences interact with other people's cultures.

**Where To Use Judgement & Creativity**

- Examples used to illustrate the points (use your own experiences)

**Not Your Typical Responsibility**

- To get into in-depth conversations
- To convince people to change

**Tips To Address Concept**

- Think of the experiences that have shaped how you interact with others. How did you grow up? Do you do things based on your ethnic background or where you grew up and the societal expectations.

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

## **Suggested Script to Address Concepts**

### **Activity**

**Step 1** – get people to stand up and have them imagine that there is an imaginary line in the middle of the room. They will have to pick a side and walk over to it based on their answer to the questions you will be asking them.

**Step 2** – ask them to stand on the side of the room corresponding to the answers on the screen. People need to pick one or the other. If they insist that they are in the middle, tell them, the one they tend to do more often or the one that has just a little more weight even if it's as 50.5-49.5 split.

**Step 3** – have them find a partner and answer the question at the bottom of the slide (click to animate). 1 min each

**Step 4** – repeat the process for all 3 slides. Ask them to find someone different to talk with.

**Step 5** – debrief. Ask people for their reflections, thoughts. How does culture / upbringing affect their answers? How different/similar were they to the people on 'their side of the room'? Sometimes, even if you answer similarly to the first question, the second might be different – there are nuances. You can use the example of offering a beverage vs. offering alcohol.

### **Key points about culture:**

We can subconsciously ascribe meaning to others' behaviors based on our own cultural orientation to how things are done. For example, if I grew up believing and/or being taught that being 'fashionably late' is a window of about 20-25 minutes after the agreed upon arrival time...and that it is good to be fashionably late, I might find it rude when someone shows up exactly at the appointed time. In fact, I may not even be ready for them. This could cause me to question their motives or even feel hurt or angry.

There are cultural rules and mores around being sick, accepting help (big deal in our field), needing help, etc. Basic requirements of a person-centred approach are sensitivity and self-awareness. Understanding that other ways of thinking and actions are a part of everyday interactions. We should be aware of our own cultural biases and perspectives.

Intercultural competence is the ability of successful communication with people of other cultures. This ability can exist in someone at a young age or may be developed and improved due to a commitment to lifelong learning and self-reflection.

The basis for a successful intercultural communication is emotional competence, together with intercultural sensitivity.

### **Transition**

The next slide provides information on cultural considerations

**Purpose:**

- ✓ Encourage learners to think about how cultural differences exist and to be conscious of their own cultural assumptions and values.

**Time:** 5 minutes

**Workbook Page:**

**Keep Culture in Mind**

> Culture is:  
 • About why you think things are right and wrong, good or bad, how things are supposed to be.  
 • Is learned and shared knowledge that specific groups use to generate their behavior and interpret their experience of the world. It includes, but is not limited to communication, rituals, and roles.

Culture can be revealed in comments like:

- That is not how we do things in our family
- That is not right
- Nice people don't do that
- Women/men don't do that
- You will embarrass the family
- That is against my (our) religion
- People with disabilities shouldn't (cannot) do that
- That is not something we talk about

Those providing support should:

- Be aware of their own cultural assumptions
- Be prepared to express their own point of view in a transparent way when necessary

May need to:

- Think about what other person's cultural values might be and check with person
- Plan how to explain cultural issues—*be understood and respected yet flexible*
- Be prepared to have more than one conversation

Center for Child and Human Development  
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No animation

**Core Concepts To Cover**

- How we need to be aware that our culture impacts our interaction with others

**Where To Use Judgement & Creativity**

- How you make the points

**Not Your Typical Responsibility**

- To get into in-depth conversations
- 

**Tips To Address Concept**

- 

**Own Examples To Use**

Blank space for providing own examples.

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

Culture is how we think things are right or wrong, good or bad. This can be learned and shared as demonstrated by communication, rituals, and roles. Often, we hear culture revealed in comments from people or families we support like:

“Women/men don’t do that” or “That is not how we do things in our family.”

Intercultural sensitivity is being aware of culture being a factor in person-centred planning discussions and making best efforts as Person-Centred Counselors to clarify, understand, and respect cultural expectations/norms for the person supported and or their natural supports.

Remind people that this takes time, practice, and a willingness to learn.

### **Transition**

Someone’s culture and their own personal history are intertwined and can give us insight into what is important to someone. The next set of slides look at histories.

**Purpose:**

- ✓ To reflect on the applicability of the skill
- ✓ To support people to capture learning and use it after the class

**Time:** 2 minutes

**Workbook Page:** n/a – skills chart handout

SKILLS	WHAT IT DOES	POSSIBLE USES	If you feel permitted, and suggest how would you use this skill?
<b>Rituals Routines</b> 	Identify the quality of a person's use of skills in real life.	<ul style="list-style-type: none"> <li>To learn what parts of rituals - could be used in the session to help to make it stronger.</li> <li>To learn more about what is important to the person.</li> <li>To learn more about what is important to the person's network.</li> </ul>	
<b>Good Doubtful Day</b> 	A way to identify the quality of the person's use of skills in real life.	<ul style="list-style-type: none"> <li>Learn what parts of the person's network are important to them.</li> <li>Learn what parts of the person's network are important to the person.</li> <li>Learn what parts of the person's network are important to the person's network.</li> </ul>	
<b>Two Minute Drill</b> 	Identify the quality of a person's use of skills in real life.	<ul style="list-style-type: none"> <li>To learn what parts of the person's network are important to them.</li> <li>To learn what parts of the person's network are important to the person.</li> <li>To learn what parts of the person's network are important to the person's network.</li> </ul>	
<b>Communication</b> 	Identify the quality of a person's use of skills in real life.	<ul style="list-style-type: none"> <li>To learn what parts of the person's network are important to them.</li> <li>To learn what parts of the person's network are important to the person.</li> <li>To learn what parts of the person's network are important to the person's network.</li> </ul>	
<b>Positive Repetition</b> 	Identify the quality of a person's use of skills in real life.	<ul style="list-style-type: none"> <li>To learn what parts of the person's network are important to them.</li> <li>To learn what parts of the person's network are important to the person.</li> <li>To learn what parts of the person's network are important to the person's network.</li> </ul>	
<b>Matching</b> 	Identify the quality of a person's use of skills in real life.	<ul style="list-style-type: none"> <li>To learn what parts of the person's network are important to them.</li> <li>To learn what parts of the person's network are important to the person.</li> <li>To learn what parts of the person's network are important to the person's network.</li> </ul>	

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**Core Concepts To Cover**

- Review each column
- Encourage participants to identify opportunities to use the skill after the class

**Where To Use Judgement & Creativity**

- How you encourage people to capture their learning

**Not Your Typical Responsibility**

- To make people add something to column 4

**Questions For Debrief/Discussion**

- 

**Own Examples To Use**

**Tips To Address Concept**

- If there is time, you can ask people what they wrote down.

### Suggested Script to Address Concepts

Please pull out your Skill Reflection Sheet. Let's quickly review the structure of the sheet:

- First column identifies the skill
- Second column provides you with information on what the skill is designed to accomplish
- Third column provides some examples of how the skill can be used
- Fourth column is blank and provides you the opportunity to write down ideas on where you think you could use this skill when you return to work (or home). Think of situations you have going on and would this skill be helpful in addressing it.

You are not required to add something (and perhaps you have no situation where the skill would be useful), but we encourage you to think about the skill and jot something down. We will be going through a lot of information and this is a way to remember the skill after the class.

***Note To Trainers: This will be the only time the Skill Reflection Sheet will be addressed in the Trainers Guide. It will show on the screen after completing the introduction and practice of each skill. Remind people to take a moment to capture their ideas on how they could use the skill when they return to work/home.***

### Transition

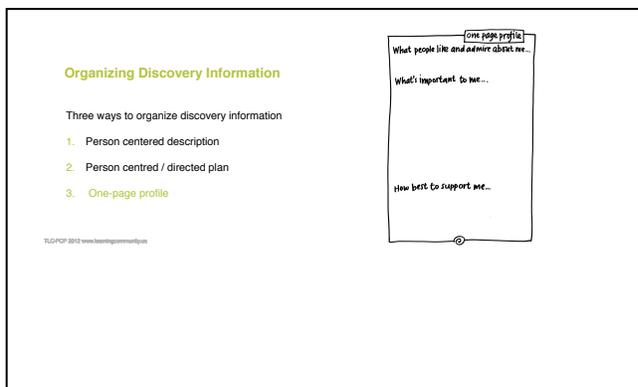
The next slides are meant to introduce the one-page profile and get participants prepared for Day 2.

**Purpose:**

- ✓ To introduce one-page profiles and get people excited about Day 2

**Time:** 1 minute

**Workbook Page:**



**Core Concepts To Cover**

- Day 2 will introduce more discovery /information gathering tools and activities
- We will create one-page profiles

**Where To Use Judgement & Creativity**

- Examples you use (but have them reviewed by your mentor trainer to ensure best quality)

**Not Your Typical Responsibility**

- How people respond to your examples

**Tips To Address Concept**

- Explain that there are different ways of documenting important information about people
- Provide a brief explanation of one-page profiles

**Own Examples To Use**

**Questions For Debrief/Discussion**

-

### **Suggested Script to Address Concepts**

#### **Slide 1**

A person-centred description should tell us what others like and admire about the person, what is important to them, and how to best support them. They can be a few pages long or many pages.

The reason why we would develop a person-centred description is to learn about the person, capture it on paper and share it with other people so that the person will get the best supports possible based on who they are as a person and how they want and need to be supported.

Developing a description involves using a variety of structured conversations. Today, we will introduce you to helpful discovery questions.

A person-centred/directed plan is a description that is used to inform and drive change in the person's life. They help identify the actions needed for this change and includes an action plan.

A one-page profile tells us what others like and admire about the person, what is important to them, and how to best support them. These one-page profiles are context specific and highlight the top information. Tell participants that today they will be using a series of discovery questions and person-centred SKILLS with each other to practice having structured conversations. To help us see how the concepts and SKILLS work together, you will create your own one-page profiles by working in pairs with a partner.

#### **Slide 2**

Simply tell participants that this is a blank one-page profile.

### **Transition**

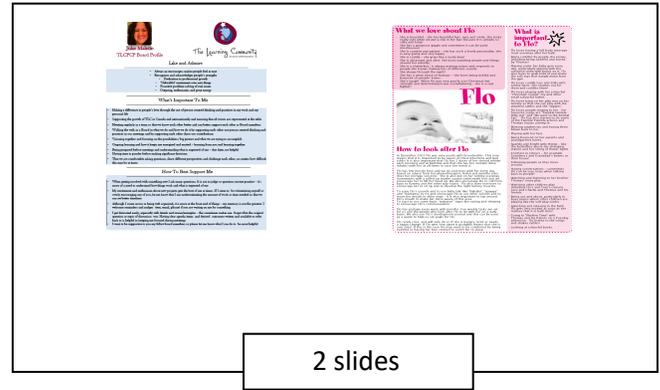
The next slides are examples of one-page profiles

**Purpose:**

- ✓ To provide examples and get people excited about day 2

**Time:** 1 minute

**Workbook Page:**



**Core Concepts To Cover**

- Day 2 will introduce more discovery /information gathering tools and activities
- We will create one-page profiles

**Where To Use Judgement & Creativity**

- Examples you use (but have them reviewed by your mentor trainer to ensure best quality)

**Not Your Typical Responsibility**

- How people respond to your examples

**Tips To Address Concept**

- Provide a quick explanation for the examples you are showing. Only 2 examples are provided today but more will be provided the morning of Day 2.
- Give people homework: Ask them to ask a few people they know to tell them what they like and admire about them. They need to bring back at least 3 things for an activity on day 2

**Own Examples To Use**



### **Suggested Script to Address Concepts**

#### **Slide 1**

Learning Community for Person-Centred Practices Board Member to share with other board members – all members share their profiles with each other. Purpose: to work better as a team.

#### **Slide 2**

Baby Flo (3 months old). Purpose: to share with family members and support providers. It was also updated before going to nursery school.

### **Transition**

This is the end of day one. Ask people to provide feedback regarding their day. Have High / Low sheets up on the wall near the door where people will be leaving and ask them to provide feedback on sticky notes. Ask for 1 idea per sticky and let them know that they can use as many as they would like. The reason for 1 sticky per idea is so that you can theme the info and share with them the next morning.

Put up the slide with the website address and log and keep it up while people are leaving.