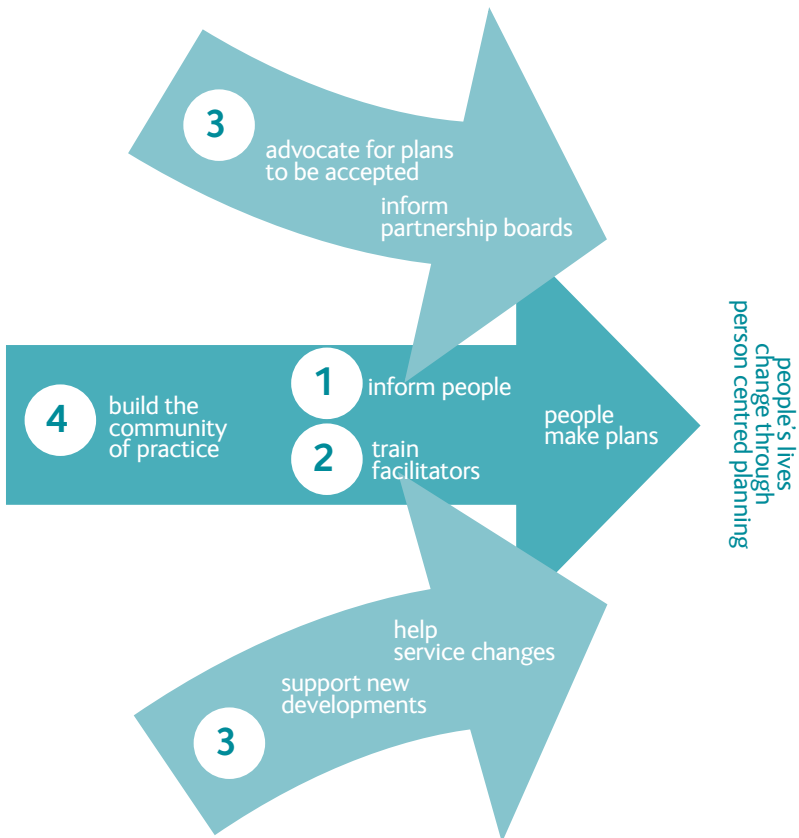


What needs to be done

In this chapter we describe in detail the four implementation tasks: informing people about person centred planning; building capacity to help people plan well; helping to ensure that plans become reality by promoting change more widely; and nurturing the community of practice.

Implementing person centred planning is only one part of the broader process of redesigning services and changing the way society includes people with a learning disability: but it reinforces and is reinforced by other changes. Implementation groups therefore need to set themselves some achievable goals in terms of person centred planning, and to go about in their work in a way which supports other changes.



However, they should also recognise that change is slow and that they are not responsible for changing everything; and that if, as a result of their work, a few more people make positive changes in their lives through person centred planning, then their work will have been worthwhile.

The implementation group has two very practical and visible tasks: to inform people about person centred planning and to ensure that there is capacity to facilitate good plans for people who need and want them. The group has two more open ended tasks: to do what it can to help people's plans become reality, and to develop the 'community of practice' around person centred planning. This chapter provides some straightforward advice on the first two tasks and then makes some suggestions for the last two tasks.

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The implementation group has constantly to balance starting small, staying close to the action and doing things well, with the pressure to get person centred planning happening everywhere as soon as possible.

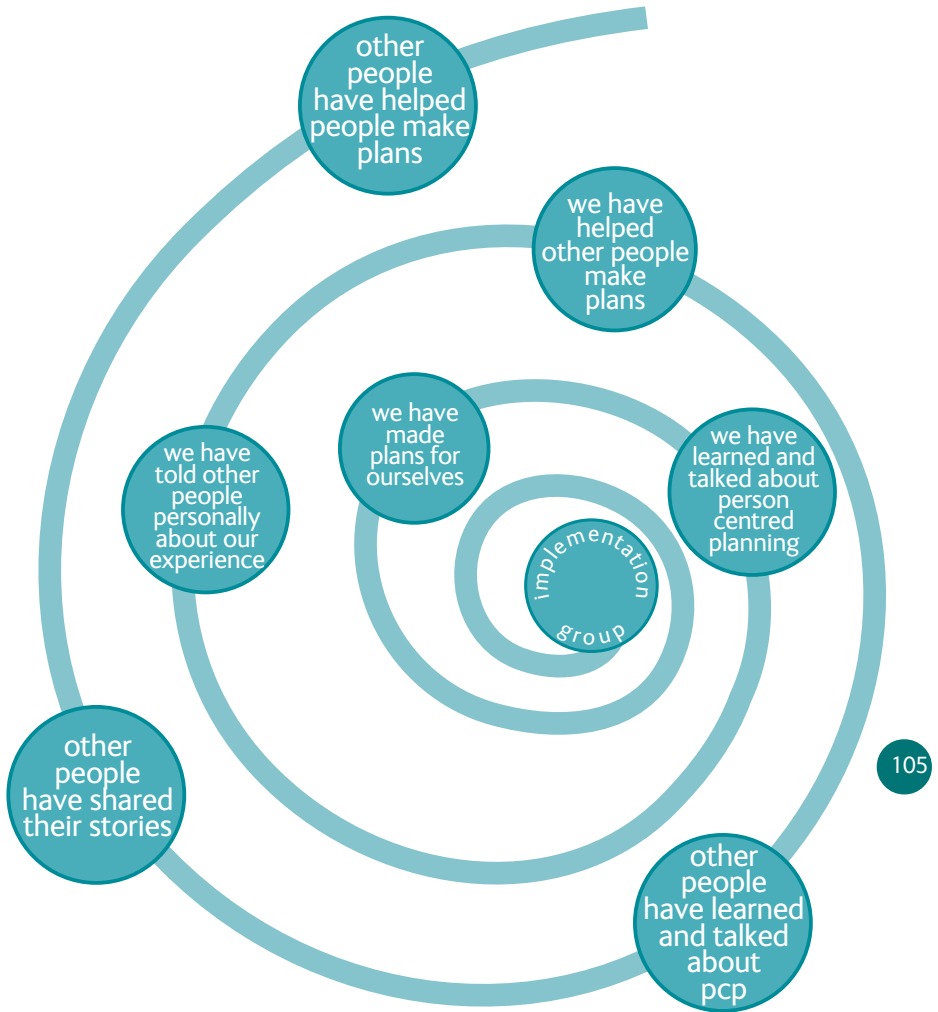
The best way of building and maintaining momentum over the long haul is to make sure that the implementation group itself is at the heart of doing and learning about person centred planning. The implementation group is like the spring in the clockwork – it needs to stay tightly wound up to keep the rest of the machinery moving.

If people on the implementation group are involved in making their own plans, learning about planning, helping other people make plans and sharing their experience, then this will guide the whole process. If the implementation group is working one or two steps removed from actually making plans, it will be almost impossible to discern what is really happening 'out there'.

The implementation group is operating within a top-down model of change management which is being led from within the service system. The advantage of this is that the implementation group has some real authority to promote and safeguard person centred planning. The disadvantage is the tendency to see the change as primarily about changing services, and to see service staff as the main participants in the change process.

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The implementation group should always remember that person centred planning is about life, not just services: that it is about reclaiming decision making and ownership of people’s lives from the system, so that services do things with and for people but not to them; and that it is about connecting people with people and places in the wider community. Person centred planning does not belong to services.

So alongside all its efforts to train staff and influence services, the group must invest substantially in giving people with disabilities, families and community members the knowledge and skills to initiate, contribute to, support people with, follow up on and facilitate planning – inside, alongside and outside the service system.

Infrastructure

An early task for the implementation group is to agree with the partnership board a practical infrastructure for person centred planning. Unless these fairly simple



things are sorted out, progress will be much slower than it needs to be.

This means, for example:

- Agreeing a policy that managers will free staff up to train and practise as facilitators across the service – not just with the people they support. This includes for example managers in voluntary sector providers, head teachers and managers of associated health professionals.
- Agreeing a policy of meeting expenses, providing allowances (for example, childcare and loss of earnings) and paying fees where relevant when lay people, families and disabled people contribute to the programme as facilitators, presenters, trainers, awareness-raisers etc.
- Agreeing a method of linking people who want plans to people who can facilitate them – whether through appointing a single co-ordinator or asking people to be local ‘brokers’ as part of their job.
- Agreeing what information to collect and how, for the purpose of keeping on track and learning from experience – for example, should someone keep a central list of everyone who has had a plan? Should there be someone with the specific job of evaluating the impact of planning?

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Thinking about scale

The goal is that anyone who wants help with doing a plan should be able to get it. Assume your authority is a medium-size authority with 250,000 people.

There are probably around 1000 adults and 500 children with a significant learning disability.

Person centred planning doesn’t come around like Christmas. Some people won’t want to have a plan at all. Some people will want a plan, start with one planning style, like ELP and then want to use another planning style, like PATH six months later. Some people might want to begin with PATH, and have regular gatherings to keep momentum going.

Let’s guess that in an average year when person centred planning is fully implemented 500 people

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(children and adults) want help with planning. At any one time, some people will need extended, in depth support and follow-through, and some people will just need help with facilitating one fairly informal meeting. Some planning will use two facilitators.

So you might aim for 100 facilitators across the whole area, each able to work with up to 10 people a year. You might guess that of these, around 70 will be staff from various agencies, 15 will be disabled people and family members, and 15 will be interested people from the community who work on a sessional basis.

It will take a while to build up – so if you aim to have the first ‘full’ year in four years time, you might be expecting to have 10 facilitators working in year one, 25 in year two, 50 in year three and 100 in year four. You expect 10% of your facilitators to drop out each year.

As well as training facilitators, you will also need to provide information to people, families and support staff so they understand planning; to service managers so they can engage in and respond to planning; and to senior managers so they can integrate what is being learned from people’s plans with the wider process of reshaping services.

The whole process of awareness raising and training works better once there are good home-grown stories to tell. Before then, the implementation group is reliant on experience and stories from elsewhere – and on theory rather than practice.

So a wise implementation group will take it slowly in the first six months – using informal routes to reach a range of people who want or need to make plans, deliberately building up the capacity to respond to requests for person centred planning, and getting some early success stories.

Over time, the implementation group will become the hub of a much larger ‘community of practice’, and one of its main tasks will be to support that community for example through mailings, e-groups, retreats, workshops, reports and conferences.



Who wouldn't want to make a plan?

Making a plan is an individual decision for people and families. For many people, a plan isn't what they need right now. If we put people through the motions of doing person centred planning because their name has come up on our list, we are not only damaging the spirit of person centred planning but we are also likely to make some listless and ineffectual plans.

Some people don't have the heart for change. They will hear about person centred planning and say 'not for me, not just now.' They are happy enough with life as it is. That doesn't mean we can't find ways of improving the service we offer them, but it does mean that there is no real energy for person centred planning.

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For some people, life really is fine just now. Other people may say they are quite happy with life just now, but only because they have such low expectations for what they deserve, or for what's possible. If so, they deserve a chance to broaden their horizons or rethink their assumptions.

This could be, for example, by meeting people who have got their own home, or are using Direct Payments, or who are in paid employment – or by going on a course to hear about new ideas and talk about their dreams. People might then say "I want to make some changes, and I want to do some planning".

Some people are on the road already – they know what they want and they have people around them who can help make it happen.

Informing people about person centred planning

Many different groups of people need to know about person centred planning. The implementation group will need to think about the different audiences, what each group needs to know and how best to inform them.

1 People with a learning disability and family members

The main reason for informing people with a learning disability and family members about person centred planning is so they can decide if they want to make a plan themselves.

There may of course, be other benefits – some people will want to become facilitators, some people will contribute to other people's plans and support them to put them into action, and some people will spread the word by telling other people about planning.

The implementation group needs to think carefully about who to tell first about planning, and who they expect will be the first people to make plans. They have to balance when a plan can make most difference with when people are in greatest need of change.

A plan can make most difference soonest where there's a discordance or tension between where people are now in their life and where they want to be; where they have some people around them who can help them make changes and stick with them when needed; and where there is some room to work in the system of supports and services around a person.

However, there are other people who need urgent change in their lives, but whose circumstances are very different. They may be living in a closed institution, or in their own in a flat – but the only people in their life are people who are paid by the service system to be there. They may be in a nursing home for older people, or be in a 'special' facility outside the area. They may be facing additional barriers to getting a decent life, because they are from an ethnic minority, or they have a sensory impairment, or they have mental health problems or a history of offending. They may have great difficulty communicating – or they may just have no one interested in listening.

Although they may not be happy with life, they may be unable to imagine a better future. They may show their unhappiness by attacking themselves or other



people – or they may simply have withdrawn from the world into a passive routine.

Finally, there are people whom the service would recommend first for planning. First, there are the people who are presenting obvious individual challenges to services – the people who are making it clear by word and deed that something is not right. Then there are the people whose service is going to change in the near future, for example because a hostel or a day centre is closing or because they are about to leave school.

Implementation groups should look for a balance between these different claims for priority in person centred planning. They need to promote some early wins by reaching and encouraging the people who are ready for change and have some personal resources and confidence to bring to the process. These will provide some of the best stories to tell, and the best ambassadors of person centred planning.

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They also have to acknowledge that the service will have some priorities, and that where services are being redesigned there is room to work and a greater chance of plans becoming real.

And they need to reach at least some of the people in greatest need. Essential Lifestyle Planning is a powerful tool for discerning and affirming what matters most for the person and for agreeing some specific and immediate actions for improving quality of life. At the same time, the person needs to get other people in his life, people who belong to him and not to the service. Citizen advocates and circles of support are two good ways to start this happening. Later, the person and the people around them will be in a better place to come back to person centred planning and use it to plan the future.

What do people need to know?

They need to hear what happens in person centred planning, what the experience is like for the person involved, and what the benefits are for them.

How best to inform them?

The best way is through word of mouth – talking to someone who's done a plan.

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Videos, leaflets and newsletter articles are also useful ways to tell people about person centred planning. The core of the information has to be:

- What is it? Where has it come from?
- How does it work? Could it work here?
- Why would it be useful for me?
- Where do I go from here?

Short information sessions can be provided where and when groups are already meeting – for example, the local People First group or MENCAP branch might be interested in having a presentation on person centred planning as part of their regular monthly meeting.

Another way to provide information is through short courses. In six hours (maybe one day or three evening sessions) people can get an introduction to person centred planning, and get a taste of planning for themselves. Courses can be just for people with a learning disability, or just for family members, or for a mix. However, people are more likely to come on a course if they already know something and are curious to learn more.

These introductory courses also provide an opportunity to spot people with natural skills in facilitation and training. The implementation group has to act as a talent-spotting agency – finding people who show promise, and recruiting them to the team.

2 Staff and managers in services

Over time, the implementation group should expect most staff in most agencies to understand what person centred planning is, when it might be useful for whom, what their part in it might be, and what the implications are for services working in a more person centred way.

Only a few of those staff will go on to become facilitators – certainly not more than 10% – and it is just as important that staff understand their role in contributing to and helping people follow through on plans.



This is a significant undertaking – in a typical authority of 250,000 people there will be upwards of 1,000 staff with a significant role in supporting children or adults with a learning disability.

Which staff are involved first depends on who is going to be making plans first. For example, one area may be offering everyone in a day service the chance to make person centred plans, using independent facilitators. The staff in the day service will need to know what person centred planning is, and how they can contribute to people's plans.

One area may decide to offer planning to young people with a learning disability who will be leaving school in the next year – so it will be essential to make sure that special school and mainstream teachers, teaching assistants, educational psychologists, Connexions staff and others all share a basic understanding of the process.

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Again, a variety of approaches will be useful. It is worth producing and circulating a general leaflet for staff in many different agencies explaining person centred planning, giving some examples of the difference it can make, why the partnership board is promoting this approach, and what it will mean for staff.

In some parts of the system, staff will already know something about person centred planning, and will be interested in learning more. Again, a one day course can introduce people to the values behind person centred planning and to the different tools as well as give people an opportunity to experience some of the process – for example by working in threes to share and record information about each other in a safe and respectful way.

In Southside, while some people developed skills in one of the main person centred planning styles, larger numbers of people attended introductory training sessions, watched a People First video on developing personal portfolios and studied a People First manual called 'Our Plan for Planning'.

The manager felt that work with staff to think about their own lives and aspirations had been particularly helpful, along with the Portfolios material,

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“[Lots of staff have started to]. ..focus, listen, spend time finding out what the person wants and dislikes. Staff are very enthusiastic and positive. They are getting a kick out of seeing people achieve things. At last staff are being treated as grown up!”

Where possible, people with a learning disability and family members should contribute to this introductory course.

These introductory courses provide an opportunity to spot potential facilitators and trainers to recruit to the team.

It's also important to make sure that the people who are working outside 'core' services also know about person centred planning so they can see where it might be useful to people. These include, for example: agencies involved in Direct Payments, or advocacy, further education, volunteering, arts and drama, health promotion or supported employment for people with a learning disability. These agencies could also be valuable sources of potential facilitators.

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3 Senior managers and elected members

As noted earlier, person centred planning risks being seen as a nice idea but not relevant to strategic planning and policy-making activity, or to organisations which do not provide services specially to people with a learning disability. Implementation groups need allies outside the immediate world of service provision, so they can find other ways to tackle the inevitable barriers to change.

Senior managers and elected members need to know what person centred planning is, and specifically what is so different about it. They will want to know how it relates to other government policies, not only Valuing People but ideas like 'social capital', 'best value' and 'listening to communities'.

They will want to think about using it more widely, not just with people who have a learning disability, and about the sorts of long term changes involved in creating more person centred services.



What is facilitation?

Facilitation means ‘making something easier’ – so what is it the facilitator is making easier?

The facilitator is making it easier for the person and the people around her to:

- Know what they know about the person and her situation.
- Recognise the person’s identity and potential contribution.
- See the pattern of problems and opportunities.
- Make a shared commitment to change.
- Decide what to do and how to go about it.

In Essential Lifestyle Planning a facilitator gathers information and insights from many sources to develop a shared understanding of the situation and what change is needed. The facilitator may work on the plan over a period of weeks before being able to synthesise all the detail and perspectives into a clear picture.

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In PATH and MAP, two facilitators work together with ‘the whole system in the room’ over a period of hours. One facilitator uses graphic recording to focus and clarify the planning conversation as it develops.

Some facilitators will have a natural preference for one approach rather than the other, while some will become equally at home with either method.

Whichever method is used, a well-facilitated planning process has ‘emergent properties’ – something happens which couldn’t have happened without working through the process. This might be a new shared clarity about the situation, or a shift in energy so that everyone sees that change is possible, or a new connection between people which creates trust, or a new offer which frees other people to support a change.

The quality of facilitation often makes the difference between ‘stuckness’ and movement. Poor facilitation takes the energy out of the process, closes down possibilities, confirms low expectations, spreads a sense of powerlessness.



Good facilitators hear more, recognise more seeds of change, see patterns earlier, keep more possibilities in play, draw on a wider repertoire of questions and analogies, stay aligned with the underlying principles despite the competing voices, and have learned more about when to speak and when to stay silent.

Facilitators need a combination of sensitivity, solidity and gumption, with an eye for detail and a capacity for seeing things differently. is born with these qualities, and even people with the right disposition take many years to acquire them.

Some of the genius of person centred planning is preserved in the design, which brings together principles and technique into a coherent instrument. But it takes genuine skill to do person centred planning well.

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Facilitating person centred plans involves realigning the energy around the person: eliciting, confirming, relating, summarising, representing, questioning, inviting, reflecting, focusing, pushing, encouraging, interpreting, checking out.

Skilful facilitators have a mastery of the tools in common use and are able to see when to change or stop or force the process so that a conflict can be resolved, a new concern addressed, or an old pain respected.

However, skilful facilitation is not enough on its own. Person centred planning facilitators need a solid understanding of and commitment to the values of inclusion and equality.

They also need to be able to guide a group in turning an aspiration into a workable plan, a notion of what life could be like into a costed, doable design for individual services and supports.

The role of the facilitator – guest appearance or resident change agent?

In some situations, it is enough for the facilitator(s) to be invited in as a skilled and interested outsider to help people do the actual planning – the person and her allies have enough capacity and organisation to set the process up and follow it through.

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In other situations, the facilitator(s) have a responsibility to have a more extended involvement, from getting 'permission' to do the planning from the person and the people in her life to taking on some of the follow through work from the plan and continuing to act as advocate and progress-chaser, sometimes for months or years.

Should facilitators be 'independent'?

Many different people can facilitate planning, and different areas have tackled this in different ways:

- Sometimes the facilitator is a staff member who already provides or manages day to day support to the person.
- Sometimes the facilitator is a professional working in the service but with a less regular or central role in the person's life – for example a speech and language therapist.
- Sometimes the facilitator is the person's care manager, who also has responsibility for organising, funding and monitoring the person's long term support arrangement.
- Sometimes the facilitator is one of a team specifically appointed by the local authority to facilitate plans.
- Sometimes the facilitator comes from another provider agency, as part of a reciprocal arrangement.
- Sometimes the facilitator is an independent consultant, or a staff member from an advocacy organisation, who has been commissioned by the local authority to facilitate the person's plan.
- Sometimes the facilitator is an independent person – possibly another family member – chosen directly by the person and/or their family.

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Each of these arrangements have advantages and disadvantages.

There are some clear advantages for people making plans if the facilitator is independent. It takes the process outside the immediate 'service' world, and ensures that the focus is on the whole of the person's life, not just services. It makes it more likely that



serious problems with the current pattern of service provision will be described openly. It also allows all the people who know and like the person because they provide a service to her to make a full contribution to the process. An experienced independent facilitator also brings ideas and insights from other settings, allowing them to ask different questions.

On the other hand an independent facilitator relies on learning about the situation from the person and the people around them who know and care about them. More importantly, an independent facilitator either has to stay with the person for the long haul, or ensure that there are some people on the inside – whether staff, family, independent advocates or a support circle – who will stay with the person and help them see their plan through.

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Some service managers will be wary of independent facilitators, and imagine that they will encourage people to make plans which are impossible or too expensive to fulfil. They may also be critical of the cost – ‘how can we be paying people a fee to facilitate a plan when we have staff of our own who could learn to do this as part of their job?’

Facilitating from inside demands a special capacity to be aware of imposing your own aspirations and preconceptions on the process, of assuming you know what other people think, and of getting people to respond to your way of seeing things rather than create a shared picture.

This matters less when making progress is possible within the existing framework of relationships, capacity and authority, but is more of a limitation when a deep challenge is needed.

Implementation groups will want to discuss their preferred balance between ‘internal’ and ‘external’ facilitation. A joint arrangement between agencies to create a ‘pool’ of facilitators who can work with people not in their own agency offers a cost effective way to ensure an independent perspective while also building in-house capacity.

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The implementation group will have added flexibility if it can also call on some more external and clearly independent facilitators – both to meet requests for planning when no one from the pool is available and to demonstrate openness when someone who needs a plan is already dissatisfied with the service being offered by the ‘system’.

Training facilitators

Who should learn to become facilitators?

Who should learn first?

In most areas, some people will already be facilitating person centred plans, so one of the implementation group’s first tasks is to meet with existing facilitators to take stock and plan ahead.

Existing facilitators will be able to give the group their perspective on the successes and problems in the current situation. It is important to spend as much time on the successes as on the problems, for example:

- Where is it working well?
- What does it look like and feel like when it’s working well?
- What are the critical factors in the situation when it works well? What can we do to build those factors in to more situations?
- What are we learning to do better?
- What difference has it made to people’s lives?

However, there will also be problems, and in many areas, these are likely to include:

- A shortage of facilitators relative to current demand.
- Many facilitators with limited skill and experience: many will have experience of using one particular method, but few will be equally comfortable with all the common tools, and few will have had experience with both adults and children or with using person centred planning in a wide range of settings.
- Difficulties in facilitators finding the time to do planning alongside their day job, and of being



available evenings and weekends (which often work best for people and their families).

- Difficulties in linking people who want plans to facilitators – facilitators being seen as part of the service rather than as a resource to people and families.

The implementation group may also want to gather some informal feedback from people who have had plans, and from service managers in services where people have had plans. What was their experience of person centred planning? What did they think of the facilitator? What has happened since?

Taken together, the successes and problems described by the facilitators and the informal feedback from people who have had plans and service managers should give the implementation group a fair idea of how to proceed.

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The early facilitators are the opinion leaders for the change process. They have to be advocates for person centred planning, and they should be seen as a good cross section – including staff and managers from different agencies and disabled people. So in many areas the first task is to broaden the base of the facilitators' group – moving out from one service or one profession or one level of staff to create a more diverse mix of facilitators.

There are two key criteria for recruiting facilitators: people have to genuinely want to take on the role, and they have to have some natural talent for it. There is no point deciding that all the professionals with a certain job title or qualification will become facilitators, as inevitably some people will not be able and some people will not be willing. Being a facilitator means going the extra mile – it should not be simply added on to someone's existing job description.

So in thinking who to train first, the implementation group will want to think about:

- Who is likely to want to make plans for themselves or their family in the near future? Who would they have confidence in?
- What particular experience or qualities might we be looking for in facilitators? (for example, being able to work bilingually)

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- Are we especially seeking to recruit and train family members and independent people as facilitators?
- Are we looking for people to plan with children as well as with adults?
- Should we aim to recruit a small group of people from a particular geographical area or a particular part of the service, so it is easier to provide peer support ?
- Who from within the service will be allowed and able to spend time planning with people?
- Are there 'naturals' we can think of from other settings – including the introductory courses – people who already have the right skills and qualities in some measure, and will be quick to apply and develop them? Can existing facilitators recommend anyone?
- How many existing facilitators are willing and able to train, coach or mentor new facilitators?

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People should be invited to apply individually to train as facilitators, rather than simply be slotted into a training course. As part of coming on the course, people should 'sign up' in some way to doing some planning and to getting some coaching and mentoring over at least a year following the training.

It helps to 'think outside the box' when looking for potential facilitators: there is no rule which says they have to be staff in learning disability services. In every community there are people who have spent ten or twenty years learning facilitation skills in another field – as counsellors, adult educators, community workers, union leaders, consultants, trainers – and some of these people would be interested in working as a facilitator if somebody asked them.

Even within services, it is easy to overlook people simply because their job is administrator rather than support worker. Person centred planning is about finding and using resources.

What should be in the training? How long should it be?

Person centred planning is about uniqueness – each planning process is different. The craft which people are learning is much more like making individual pieces



of furniture to order than assembling furniture from a flatpack.

So facilitators need to understand the material they are working with – hopes and dreams, love and fear, choices about what matters most, pride and prejudice, power with and power over, important to and important for. They need to know what makes person centred planning tick, not just how to turn it on and off.

The best way to learn is by pairing up with an experienced facilitator, and learning by watching, then doing, and then getting feedback. Training can only get people started – the real skills are learned through practice, coaching and reflection.

The training needs to provide space for thinking and learning about the principles and theory of person centred planning, and about the role of the facilitator: and space for learning about, watching, and practising the specific skills and tools which facilitators use.

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All facilitators will benefit from learning the skills of graphic recording. Not all of them will become skilful graphic artists, but all of them will learn how to listen intently, pick out the key meanings, remember people's actual words, and relate different contributions to each other by use of space, colour, arrows, and icons.

If time isn't spent thinking about the principles of inclusion, and the way person centred planning is designed, then people will use the tools with their old mental models of what's important, who they are, and what they are doing in people's lives.

It's easy to assume that people have got 'it', and to collude in saying 'we are all pretty much in agreement about the values, so let's get straight into learning the tools'. Easy, but dangerous. Unless people are solid on the values of inclusion, then they cannot be a true anchor in the process. And unless people see that as a facilitator they have a different role and different responsibilities than as a professional (or as a parent), then they don't understand what they are doing.

There is a lot to learn, yet agencies often resist the prospect of six whole days spent learning something

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so challenging, something which is not just an add-on skill but a refocusing of practice wisdom.

One training structure for facilitators is:

- A general one-day introduction to person centred planning and person centred working.
- Four to six days initial facilitator training, which combines learning about the theory, core elements and principles of person centred planning with learning how to use the tools. As far as possible, people practise on the training course the actual skills and roles they will use 'out there' – listening, summarising, recording, enquiring, inviting, organising, refocusing etc.

These six days are usually in two or three blocks, so people have the chance to do some real world practising in between as well as on the course.

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The first people they practise on are each other and other course participants. Having your own plan done is a key requirement before starting to work with people who need you to know what you are doing.

- Opportunities to do and reflect on planning with a coach or mentor.
- Recall and follow up sessions with other facilitators – some with a focus on additional teaching, some with a focus on guided reflection and problem solving.

Even this extended training period is only the beginning in becoming a skilled facilitator. Most learning is through doing and reflecting over a number of years.

Training isn't enough on its own, but for many people, learning about person centred planning is a powerful and life-changing experience. People never see things quite the same way afterwards.

How should disabled people and families be involved in training facilitators?

It is essential for the training to be informed by families and disabled people, but there are different views about the best way to do this.



Ideally, people who are on a training course for facilitators should be there because they are learning to be facilitators.

Like staff, some families and some disabled people have the natural ability to become skilled facilitators, but many don't. This doesn't mean they can't contribute to person centred planning, just not as facilitators.

There are other really important roles, like telling people about person centred planning, helping people organise their plan, supporting someone during their meeting, or helping them follow up their planning meeting.

People may need some training and mentoring to take up these roles, and while the facilitator training may not be designed specifically for this purpose, if it's happening and there is a place available, it may be better to be flexible and invite people anyway.

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Families and disabled people might also contribute as co-trainers in training facilitators, either as co-trainers for the whole course or by leading a specific session, for example, on the experience and the consequences of having a plan done, or on the qualities of a good facilitator.

The training should draw on people's current experiences. As well as gaining permission to use people's stories to illustrate particular points, trainers need access to what people are saying about person centred planning: how it's different, what they want from it, how they see the role of the facilitator, what's been difficult to follow up, how it could have been better.

Members of Manchester People First make the following suggestions:

- It's better to have trainers that include people with disabilities.
- Spend time thinking about what you want to get out of the training and share this with the trainers.
- Attend training where there is a small group you feel comfortable in.

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- Make sure that where you live has training for other people, for example care managers, so that people understand what they should be doing to help with getting what is in your plan.
- It's better to have training over time, with follow up sessions for completing plans and sharing them with people who can help make them happen.

For information on training resources, see the Valuing People website at www.doh.gov.uk/vpst.

Continuous development through reflective practice

“Those who treat person centred planning simply as a technique and those who fail to provide for their own development and support will offer little benefit to the people they plan with.” (O'Brien and Lovett, 1992)

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Person centred planning requires new skills, new knowledge and new ways of thinking. To achieve this requires mentoring and coaching. Michael Smull reminds us that in the absence of adequate support people will revert to what they know, and do traditional planning but with new labels.

Southside and Northside invested heavily in supporting facilitators, through action learning sets. Southside took this further and created a person centred planning co-ordinator to support and coach facilitators.

There was no structured investment in supporting facilitators in Eastside, and many facilitators left. We asked who the 'best' staff were to invite to facilitator training. 'There is no point doing that' said the senior manager, 'they will just leave'.

Investing in ongoing support is the best way to retain staff and ensure their effectiveness.

There are many different ways of supporting facilitators to develop, reflect and problem solve after their training.



- **Buddies**
In one district people attending a facilitator course are joined for an hour by experienced facilitators who share their experiences in planning. They then buddy up with a 'trainee' facilitator and commit to contacting them three or four times over the time that the person develops their first plan. As these new facilitators become more experienced, they in turn buddy up with the next group of new facilitators.
- **Mentors/coaches**
The person centred planning co-ordinator in one district acts as a coach to new facilitators. She meets with them initially on a weekly, then eventually monthly basis to help them develop their facilitator skills.
- **Action learning sets**
An action learning set is a structured process for supporting people to think about a difficult situation in a new way through asking thoughtful questions. When facilitators have completed their training they attend a half day action learning set every 2 months to problem solve and action plan. Two neighbouring organisations work together and swap action learning set facilitators. See, for example Weinstein (1995).
- **Informal gatherings**
In one area there is a weekly drop in for families and carers who are developing a plan. This takes place at the carers centre, where there is an experienced facilitator to help problem solve. The facilitator is also a member of the implementation group and with permission she keeps this group informed about the successes and blockages for the families.
- **Networks**
Person centred planning facilitators have set up geographical and e-groups for networking, further training, learning and reflection.

These networks have been able to connect families and young people with facilitators in their area.

Helping people's plans become a reality by promoting change more widely

“In many ways, finding capacities is fascinating and creating a positive future is exciting. The long term benefits of implementation are rewarding but the process of solving problems over time is just plain hard work. There is no way round it.”
(Mount et al, 1991)

We have described the two core tasks for the implementation group as informing people about person centred planning and building capacity to make plans by training and supporting facilitators.

At the same time, we know that implementing person centred planning means not just making plans, but making plans a reality.

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We also know that the sort of things that most people want from their plans: are to have decent lives as part of their communities, to have a home of their own with or without a partner, to be respected, to have some useful work, to have a sense of everyday choice and control, not to be desperately poor, to be able to travel, to get to use ordinary services and facilities alongside other people, to have a sense of belonging, not to be harassed or discriminated against, to make a contribution and to have some friends.

And we know that our society and our existing service system struggles to help people achieve these ordinary things.

So for person centred plans to become reality, some deep changes are needed in the way we organise and provide services to people and families. These are the sorts of changes set out in Valuing People, and it is the partnership board rather than the implementation group for person centred planning which is responsible for these strategic changes.

However, the implementation group can ‘work outwards’ from person centred planning to support the wider changes, for example by:



- Advocating on behalf of people whose plans are being blocked by service attitudes and practices.
- Drawing out the learning from successful plans and the implications for strategic changes in service infrastructure and policy.
- Providing training and support to existing services to help them become more person centred.
- Working with others to develop new services and supports that can respond better to what people want.

Advocating on behalf of people whose plans are being blocked

The implementation group has been given authority to promote person centred planning as part of the major service and social change implied by Valuing People. That gives the group both the authority and the responsibility to speak up when people's plans are being blocked by service attitudes and policies which run counter to Valuing People.

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For example, in the case of Jean and Lucy's story on page 69, the group should say to the chair of the partnership board:

“Person centred planning is being frustrated in this area because x agency is refusing to recognise people's plans. This goes against what we say in our published commitments to people and their families. We need you to support person centred planning by bringing this agency's policy into line with what our partnership has agreed.”

This is a clear example of a service actually blocking person centred planning. Often, the blocks are more subtle, and a case of the service having its own priorities and ways of doing things rather than deliberately setting out to thwart people's aspirations:

“We know that your plan is to have your own flat, but we do have a space available now in a flat with only one other person and it is in the area you wanted.”

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“We know that one of the big things on your plan was to get out more and meet more people in the wider community who might share your interests, but it’s difficult because of the way the staff rota works, and staff sickness, and the fact that sometimes people are in a crisis and have to focus on them.”

“We know getting a job is really important to you, and we have referred you to the supported employment agency, but they do have a long waiting list and there’s nothing much we can do about it.”

“We know you are looking for flexible family support instead of Jane going away into respite care, but we just haven’t been able to recruit anyone suitable who can work the hours you want.”

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And sometimes the blocks are to do with the small things, the things which matter a lot to the person but somehow slip beneath the service’s radar:

- Bill’s tapes keep finding their way into other people’s tape players.
- The support worker who combs Joanne’s hair talks to the other support worker in the kitchen while she’s doing it.
- The invitation to call round and see the neighbours never quite gets taken up.

Simple, but not easy

After her mother and father passed away, Linda was taken to live in a hostel on the other side of the town. She never really settled there and soon received a new label of ‘challenging behaviour’. People knew Linda was unhappy and asked her where she wanted to live, Linda replied, “back at home”.

As this clearly wasn’t possible as the house now belonged to someone else, Linda was moved to



another hostel. Again she was not happy and as the social services department began to 'resettle' all the people living in the hostel she was moved to rent a house of her own, again not in her known local community.

Linda only received staff input Monday to Friday, no weekends or evenings, the time when she needed people most. This did not work and Linda was placed into a residential home.

Within 6 months Linda was reported to have become 'challenging' again. This process of moving continued to a further 3 placements in group homes and emergency hostels.

"Does nothing satisfy this woman?" people asked. No, it didn't because what Linda wanted wasn't offered in a set package from health and social services – she wanted something individualized, for her.

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Knowing how unhappy Linda was, a group of people were called together to help Linda establish what she wanted. At this stage it was called a 'strategy meeting'. Linda stated she wanted to live in a flat on the same street that she had lived with her family but over the top of Asda's cigarette kiosk. She did not want to live with other people who needed support. She wanted to continue going to her local day centre and wanted staff to help her with her money during the day and staff to support her on a pop in basis for cooking at weekends and in the evenings.

This doesn't sound too complicated does it? Here are the obstacles Linda had to face:

"We don't do weekends and evenings for people living independently, we only do that in group homes."

"We can't do budgeting with her during the day because she is at the day service and that is not day service staff responsibility."

"The flats on that road are general let not special need flats."

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“There aren’t any flats over the top of Asda.”

“She won’t manage on her own, look what happened last time.”

It would have been easy to listen to these views and find her another ‘placement’ to fail, but that is not what happened. Linda was supported to call together another circle of people – this time people who really wanted to help Linda get what she wanted. They asked:

“Why can’t people living independently get support at weekends and evening?” The answer, “No reason, just that it had never been practice to do so.”

A group of staff from a nearby home stated they would be willing to support Linda on her pop in basis at the times she needed.

Linda asked her day service staff if they would be willing to help her with budgeting during the day, they said yes. They had never been asked before!

Linda did not need a ‘special needs’ flat, she needed a general needs flat. Indeed there were no flats over the top of Asda but Linda was supported to go the local housing office and say what she wanted. The housing officer stated there were no flats above Asda but there were a few at the side of Asda and it was still on the road Linda wanted to live on.

Linda moved into her new flat 4 years ago, it is the longest she has ever lived in one place apart from her family home. She has a helpline phone that enables her to press a button if she feels she needs help; she has made friends and neighbours. Linda still misses her mum and dad terribly but she loves her flat and is planning to redecorate it. Linda says she doesn’t want to move again, she is settled.



In Linda's situation, it was Linda and the circle of people around her who kept advocating for what Linda wanted, and overcoming obstacles. The implementation group can add its voice to Linda's circle, but only if it keeps its collective ear close to the ground and hears what is actually happening with people's plans and people's lives.

In Southside the person centred planning co-ordinator identified, influenced and communicated what was being learned. Her personality and natural connection with staff and People First meant that she got to hear about situations where change was needed. She then used her judgement about the best way to follow through.

Both Northside and Southside used action learning sets not just to share success but also to learn about issues that prevented people having the lifestyles they wanted.

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The implementation group can promote service change through training and development – see below: but it also has a clear role to speak up when service practices and attitudes are frustrating people's plans.

Drawing out the lessons from successful plans and the implications for policy and infrastructure

This sounds more complicated than it is. It means that the implementation group needs to see the patterns in successful and unsuccessful planning efforts and advise the partnership board on how the system needs to change to help more people get the life they want.

“Focusing on one person at a time makes it possible to diversify opportunities by following different individual interests into distinct sectors of community life and allows learning about how to personalise the assistance required to fit individual circumstances. However it can become an excuse for avoiding the administrative work necessary to make service system resources flexible and responsive to individual differences.” (O'Brien and Lyle O'Brien, 1997)

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For example, in Linda's story above, the partnership board could be asked to make it clear to people with a learning disability, families, managers and staff that all day service staff can be expected to help people manage their money; and that people living in their own flats as well as people living in group homes can have support in the evening and at weekends.

As part of the partnership board, the local Housing Department might also be asked to make sure that its services are actively reaching out to people with a learning disability. They might also be asked to think about how many other people with a learning disability might find the helpline phone service useful.

Similarly, as a result of Jane's story below, the partnership board could be asked to ensure that a similar approach is followed for all the young people with high support needs in transition – particularly for young people in out of district placements. The key features of the approach are: starting early, involving Jane and her mother fully; local staff spending time in the school and learning from school staff; valuing everyone's perspective; and being prepared to use Direct Payments or individualised funding to design something bespoke for one person.



Jane - using ELP as the bridge back home

Jane has been labelled as autistic and as having severe learning disabilities. At 16 she had been placed at an out of district school having been excluded from a local special school on grounds of challenging behaviour.

As she reached school leaving age, Jane was at risk in that:

- As someone in an out of district placement she might not get enough attention in transition from the care management service in her home town.
- As someone with autism and a reputation for challenging behaviour local adult services might find it very difficult to offer her service and choice locally.



Jane's life is not 'fixed'. It seems clear, however, not least to Jane's mum, that the ELP and the careful, committed work of those involved, have contributed towards a positive experience of transition, and the design of supports which are working for Jane better than anyone involved might have expected.



Providing training and support to existing services to help them become more person centred

Person centred planning is about life, not just services; but many people with a learning disability can only make the changes they want in their lives if they have the wholehearted support of services. The implementation group has many opportunities to influence the culture of existing services.

Influencing first line managers

First line managers are one of the key variables that affect whether plans are implemented or not. This was confirmed time and time again from our initial learning from implementing person centred planning, and learning from research into implementation within organisations. (Sanderson, 2002)

Person centred planning requires service managers to find new ways of managing – at its heart, it is about sharing power and control.

When managers were not involved, or did not fully understand what was happening, implementation was a struggle at best, impossible at worst. On the other hand, supportive managers can embed person centred approaches, reflection and learning in 'the way we do things around here'.

Michael Smull suggests that for most organisations sharing power and control requires new policies and practices as we move from a passive 'professional know best' approach to an active, questioning, learning culture; from a blame culture to an accountability culture and to create a culture of partnership rooted in respect and trust.

An organisation that is developing in this way will change the ways that staff are recruited, look with people who use the service at the match between staffs individual talents and gifts and the people they support. See, for example, Fratangelo (2001)

Being a person centred manager means consistently viewing all issues/problems through the lens of helping people get the lives that they want.

Westside and Northside invested in specific training to enable first line managers to reflect on what being 'person centred' means for the way they work. First line managers said this was significant in embedding person centred planning within day to day practice and ensuring that changes took place.

Managers have to be allowed, willing and able to make their service more person centred.

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'Allowed' means that the manager's organisation genuinely supports a more flexible approach, knowing that this may involve greater risk of something going wrong, greater autonomy and judgement for front-line staff, less proceduralisation and standardisation, greater exposure to ordinary people and places in the community and different ways of deciding about and spending money.

'Willing' means that the manager sees the value of working differently – so she has to see that there is something in it for her as well as for the people she serves. If that something is 'greater job satisfaction' then her job has to be designed in a way which means she actually gets the satisfaction of spending time with people and seeing how their lives have changed.

'Able' means that the manager has the skills and confidence to manage a more complicated and fluid service; that she can lead and coach and support staff who are often working at the edge of their experience in dispersed settings at different times of the week. She needs skills in problem solving and risk assessment; she needs skills in getting the best out of community resources and in building the community's competence and confidence; and she needs to be able to work with people rather than do things to them.

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So the implementation group needs to discuss with managers the sort of training and support which would be useful in making their service more person centred – and then needs to recommend to the partnership board a serious programme of training and support. This programme needs to be commensurate with the scale of the change expected of service managers.

Any programme of training and support for first line managers also has to recognise the implications for senior managers in the organisation and for wider organisational policies. There is no point asking first line managers to work on the basis of trust rather than blame if the organisation above them is still wedded to a blame culture. Nor is there much point in asking managers to use resources flexibly if they have no discretion in the way they use their budget.

Other training

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Southside developed a range of courses for people who wanted to learn more about person centred approaches. These included communication passports and dictionaries. The speech and language therapists were centrally involved in the development of person centred planning and worked with the co-ordinator to expand on the communication section from ELP and developed this into 'communication dictionaries'. This now forms an important part of the work done by communication therapists.

Southside also worked with self advocates on how they could take more control of their meetings.

In Westside, they provided training for human resources staff to help people see how job descriptions and advertising may need to change as a more person centred approach was adopted.

Knowledge and skills are needed in many areas to design and maintain individualised support arrangements, for example:

- Active support.
- Working as person centred teams.



- Designing and costing individual supports.
- Direct Payments.
- Trusts and microboards.
- Helping people choose, get and keep a job.
- Housing options – ownership and shared ownership.
- Relationships and community connecting.

Implementation groups should review the training provided by and purchased by local organisations and the partnership board to make sure that training in these areas is being offered – and that all staff training from induction onwards specifically promotes person centred working.

Working with others to develop new services and supports that can respond better to what people want

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Person centred planning will have more bite and be more effective, will make a greater difference sooner when the following are in place:

- Individualised funding and Direct Payments are available as a matter of course, with an infrastructure to make them easy to set up and use .
- There is a diversity of service provision – as well as a range of supported living agencies there are agencies and projects with a focus on employment, or further education, or arts, or inclusive leisure.
- People have access to a range of housing options, including home ownership.
- People have access to independent advocates and circles of support.
- There is a healthy infrastructure of, support for, and high level engagement with People First groups, and parent/family organisations.
- There has been an investment in leadership development, for example through Partners in Policymaking course.
- There has been significant investment in community development, mainstream competence and community connecting, so

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that ordinary neighbourhoods, community groups and generic services naturally expect to include people with a learning disability.

Where some or all of these conditions are not met, the going will be tougher.

Services for people with a learning disability are trying to manage change and development in many areas. For example, many partnership boards have established sub groups and working groups to develop housing and employment opportunities for people with learning disabilities.

The implementation group is not responsible for putting all these helpful service developments in place. However, it can ensure that people working on these parallel agendas know about person centred planning and that facilitators are well informed about these other developments and possibilities.

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Building the community of practice

The implementation group should see itself as the hub of a growing network of people in the area with an interest in and commitment to person centred planning as a way to achieve change.

Such a 'live' network focused around a particular discipline is often described as a 'community of practice'.

“Communities of practice are groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis.”
(Wenger, McDermott and Snyder, 2002)

The implementation group has a key position from which to build and nurture the local community of practice around person centred planning. This does not mean the implementation group is the font of all wisdom, or that nothing was happening before the implementation group came along, or that the implementation group is 'in charge' of everyone.



It simply means that the implementation group is well placed to issue invitations: to gather learning so it can be shared; to consult people on questions of policy and practice; to keep people in touch with each other through newsletters, e-groups and discussion groups; to organise opportunities for reflection and renewal; to introduce new ideas; to collect and share a bank of materials and resources; and to develop and maintain links with the national and international community of practice that has grown up around person centred planning.

For person centred planning to thrive, many people have to work together to create a body of organisational knowledge which is widely held rather than locked up in a small group of experts.

The implementation group can act as a focal point for people involved in person centred planning locally – and to do this it needs actively to keep in touch with people, ask people for their opinion, organise meetings, provide information, collate resources, link people who want plans to people who can help; and of course most of all gather the stories of person centred planning in action.

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The implementation group is also uniquely well placed to safeguard the quality and integrity of person centred planning. It cannot do this by seeking to police every plan, or supervise every facilitator's practice.

However, it can bring people together to discuss and publish some principles and practice guidance for person centred planning – “This is what we mean by good planning, and this is the standard to which we hold ourselves accountable”.

The implementation group can also point out when person centred planning is being distorted through ignorance or cynicism to serve another purpose.

This community of practice is organic: people are members because they participate. And membership is open to anyone who shares the concern or passion – people with disabilities and families as well as staff, service managers and staff as well as facilitators and trainers.

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People who have had plans and are willing to share their experience: managers and staff who have seen the positive impact of person centred planning on individuals and want to see this happen more often; people who are experienced facilitators and people who would like to learn – these are all valuable members of the community of practice.

In the long term, effective implementation will depend on strengthening and sustaining this community. This is why, although having a co-ordinator is a requirement for implementation groups, it should never be a substitute for engaging and involving everybody with a contribution to make.



Moving From

Towards

Treating everyone as if they all see person centred planning in the same way

Identifying who the enthusiastic 'product champions' are, who has to release resources, and who may be less enthusiastic about planning

Ignoring people who are negative about person centred planning

Spending time listening to people with different points of view

Deciding certain groups of staff will be facilitators, regardless of their talents or motivation

Inviting enthusiastic, committed people with genuine potential to become facilitators

Assuming that staff who already work with someone will facilitate their plan

Balancing 'internal' and 'external' facilitation, and developing a pool of facilitators working across services

Only telling staff about person centred planning

Spending as much time telling families and people with learning disabilities – and making sure that senior managers and elected members know about it too

Just giving facilitators training and leaving them to get on with it

Providing structured opportunities for people to reflect, be coached, problem solve and continue to learn
Seeing this as important as training

Only training people in person centred planning

Recognising that for plans to make a difference requires people having skills in problem solving, service design, community connecting etc.

Developing a small team of experts

Building and nurturing a diverse and growing community of practice

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