
Person-Centred Planning in its Strategic Context: Reframing the Mansell/Beadle-Brown Critique

David Towell and Helen Sanderson

Centre for Inclusive Futures, 47 Highbury Hill, London N5 1SU, UK

Accepted for publication 25 September 2003

Valuing People, the English national strategy launched in 2001 is founded on the twin principles of self-determination and social inclusion. It promotes a vision of people with intellectual disabilities in the mainstream of life. To achieve this goal, it seeks to integrate a wide variety of elements, in which person-centred planning (PCP) is one.

The Mansell and Beadle-Brown review makes many interesting points about PCP in this context. We reframe their critique in three main ways: by more fully recognising the extent to which PCP is an intrinsic element of the

national strategy, helping to operationalise its core principles; by crediting the ways in which individual planning and action are intended to become part of one continuous process; and by showing how the strategy addresses the challenge of scale by prioritising quality rather than quantity in implementing PCP, with the aspiration of creating a virtuous spiral of positive change.

Keywords: intellectual disability, person-centred planning, strategic change

Introduction

We first need to introduce ourselves and the perspectives we bring to the important paper by Jim Mansell & Julie Beadle-Brown (henceforth *the critique*). David Towell is a family advocate who, with Professor Mansell and a wide network of committed colleagues, has long played a UK national leadership role in promoting *An Ordinary Life* for people with intellectual disabilities, based on the twin principles of self-determination and social inclusion (Towell 1987; Towell & Beardshaw 1991). When New Labour came to government in 1997, he was well-placed (again with an influential network of colleagues including Professor Mansell) first to advocate for and then to help produce an English national strategy for improving the lives of people with intellectual disabilities, which takes these principles as the starting point (Towell 1997, 2000). This was published as *Valuing People* (Department of Health, 2001b). Helen Sanderson is co-author of two of the best known British books on person-centred planning (Sanderson *et al.* 1997; Ritchie *et al.* 2003). She also co-wrote the government's official guidance on implementing person-centred planning as part of the *Valuing People* strategy (Department of Health 2001a). We both earn our living

working with disabled people, families, local agencies and government to help them deliver on the *Valuing People* vision and to learn from critical reflection on the experience of implementation.

From this perspective, we greatly welcome publication of *the critique* and, even more, the Journal's decision to invite this set of commentaries on the issues raised. Our focus on the UK makes us slightly apologetic to the Journal's international readership, but this is where we know best, it is also the focus of *the critique* and it is, of course, very significant that our government has signed up (in the hand of the Prime Minister no less) to a 21st Century intellectual disability strategy and made person-centred planning a key route to radical change in peoples' lives.

We trust this discussion will promote better understanding of person-centred planning in this strategic context and thus contribute to delivering the better outcomes, which both personal values and national policies require.

The Mansell/Beadle-Brown critique

As we would expect from these authors, *the critique* covers a lot of ground and brings together observations

from an impressive range of research literature. Reading it from our perspective, we have identified, at a first level of approximation, two main sets of arguments which we label, *hopeful* and *sceptical*, respectively.

The hopeful critique

1 Identifies individualization as central to any modern approach in improving the lives of people with intellectual disabilities.

2 Recognizes that the approach to person-centred planning in *Valuing People* has learnt from past experience of individual planning, notably in its fresh emphasis on:

- starting from the experiences and aspirations of intellectually disabled people in their wider social context;
- seeking to shift power in their direction;
- addressing support to achieving greater social inclusion; and
- understanding 'planning' as a continuous process of creative problem-solving focused on action to achieve better outcomes.

3 Affirms that this approach is intended to include everyone, irrespective of the nature and severity of their impairments (and indeed gives early priority to people, like those left in the remaining institutions who may be most at risk of further disadvantage).

4 Points to the investment in guidance, training, mentoring and lateral networking through 'communities of practice' as means to strengthen capacity in effective person-centred planning.

5 Appreciates that the national strategy makes the mandate for person-centred planning one key vehicle for promoting change in the current pattern of local opportunities and supports, within a wider policy framework designed to modernise both specialist (intellectual disability) and mainstream services through a programme of investment and reform.

6 Identifies other aspects of the strategy which should reinforce these efforts, including emphasis on disability rights, extension of direct payments, separation of person-centred planning from the 'rationing' concerns of traditional care management and heightened attention to impact in public sector performance management.

We entirely endorse *the hopeful critique*. In our policy and practice-influencing roles, this is more-or-less precisely what we had in mind!

Meanwhile, *the sceptical critique* can be summarized more baldly:

1 For a range of reasons, previous experience of individual planning has been disappointing and there is, so far, a lack

of systematic evidence (beyond case studies) of person-centred planning doing better.

2 The national strategy appears to be setting a huge task if person-centred planning is to be available to all people with intellectual disabilities who want this.

3 It is a big task in another sense if people with severe disabilities are to be engaged in a person-centred planning process, which aspires to both understand their experiences and preferences better and widen their networks of informal relationships.

4 Whatever the skills of facilitators and the quality of the planning process, funding constraints in the public sector are likely to undermine effective action on these plans.

5 In any case, positive change could just as well be achieved by direct intervention in existing services, a training focus on enhancing the skills of direct delivery staff to make a tangible difference in everyday life and staff supervision to match.

6 Further shifts in power to people with intellectual disabilities require additional policies from government, for example, to give legal weight to individual plans and/or shift financing to a social security model based on entitlements.

We would not necessarily express all these points in the same way, but if this is understood as a list of the main challenges, which the strategy defined by *the hopeful critique*, needs to address in enhancing the prospects for success, we have a lot of sympathy with most of these arguments. Indeed (Point 1), person-centred planning in the new era must strive through both design and discovery to do better than much of what has gone before. Of course, *Valuing People* should not be the end of policy development, but rather a staging post from which to argue for greater investment (Point 4) or greater benefit from the significant programme of mainstream investment which is already under way – we would add, tied to the prospects for delivering more positive outcomes for individuals – as well as for further shifts in power (Point 6). *The hopeful critique* already recognizes that the focus on person-centred planning needs to be an integral part of wider strategies, which include service modernization and related staff development (Point 5) and, of course, we must work hard to ensure that person-centred planning has a positive impact in the lives of people who have, for example, limited 'receptive language ability', experience of choosing or informal relationships (Point 3). About the scale of the enterprise (Point 2), we think that public policy recognizes the fact that local agencies need to gradually widen the number of people assisted directly through person-centred planning while using early experience as

a signal about the larger-scale changes in provision which are likely to be required.

Integration versus dissociation

We believe that any major programme of social change needs some creative tension between hope and scepticism, although we are tempted to think that *the critique* allows the latter to get the upper hand! This is perhaps most clear where the authors choose to disassociate related ideas or activities in ways that make them sound oppositional or, at least, mutually independent.

One example of this dissociation is actually in *the critique* running title: 'person-centred planning *or* person-centred action' (our italics). The term 'person-centred planning' is a short hand. The concept is defined in public policy as follows (Department of Health 2001a; p. 12):

'Person centred planning is a *process* for *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. . . . (It) is the basis for problem solving and negotiation to mobilise the necessary resources to pursue a person's aspirations. . . .' (our italics).

In this definition, listening, planning, acting and learning are all integral parts of the same continuing process. If the purpose of the *or* is to draw attention to the risks of planning getting separated from the action, as in previous service-based individual planning, this is helpful in articulating one key challenge (albeit a challenge clearly anticipated in the national strategy), which we would express in the question '**What are the conditions required for person-centred planning to enhance significantly the prospects for helping people achieve greater self-determination and social inclusion?**'

The critique makes another kind of dissociation in discussing the place of person-centred planning in wider strategies for change. It is argued (p. 3) that:

'Greater individualisation in practice may therefore be the result of a number of different aspects of the great changes in service provision, acting alone or in combination. It may owe at least as much, for example, to changes in the kinds of services provided and the associated changed attitudes of staff as it does to particular methods of planning. Assessment of the weight given to person-centred planning in . . . *Valuing People* therefore requires evaluation of the contribution made by planning systems *as distinct*

from other changes in service organisation. . . .' (our italics).

Well, yes, strategy implies the judicious weaving together of a number of strands of activity, and it would be wise to monitor their cumulative impact on achieving desired outcomes. That is precisely what *Valuing People* tries to do, doubtless with strengths and weaknesses, which will become clearer as implementation proceeds. It is also correct that this process of learning from implementation should keep in mind whether the right balance is being achieved between different interventions in both their scale and timing.

However, in our conception of the national strategy, it is difficult to envisage person-centred planning processes as one of a number of independent variables whose impact can be assessed *separately*. Indeed, we would argue that social change of this complexity requires a more holistic approach. Positive change is likely to emerge from the interplay between dynamic processes in which person-centred planning (as defined here) is intrinsic *inter alia* to the growing empowerment of people with disability, specialist service development, greater access to the opportunities and resources in mainstream provision, and to the development of staff with the attitudes and skills required to promote all three of the preceding objectives. For us then, the key questions raised by this part of *the critique* are: '**What are the functions of person-centred planning in the strategy as a whole?**' and '**How can this and complementary aspects of the strategy best be integrated so as to maximize progress?**'

In what follows (as far as space allows), we will continue our reflections on *the critique* with these three questions (in bold) to the fore. We will describe our understanding of how person-centred planning is being developed as an integral element in the national strategy, the key functions it plays and what current local experience suggests about the dynamic relationships between different processes.

Person-centred planning and strategy

For the international readership, we should begin with a brief recap on *Valuing People* (see also Towell 2001). This English national policy framework, launched in 2001, offers the prospect of a major step forward in building a society in which people with intellectual disabilities can participate as equal citizens. The White Paper starts from their perspectives and an honest recognition of the huge gap between reasonable expectations for a full life and most peoples' experience. It marks a radical change in orientation from previous policies firstly, in identifying

exclusion and discrimination as the root cause of this pervasive disadvantage and secondly, by promoting a vision of people with intellectual disabilities in the mainstream of life, taking opportunities and using services alongside their fellow citizens, with additional support where necessary. Accordingly, it grounds the national strategy in a rights-based approach, incorporating the principles of independence, choice and inclusion. It also offers a comprehensive agenda for service change, covering the life span and addressing all aspects of experience from early development and assistance to families, through education and health to housing, work and leisure, etc.

To deliver on this agenda, *Valuing People* promises 'joined up' policies at the national level and creates new forms of local multi-agency partnership (Partnership Boards) with the responsibility for enabling people with intellectual disabilities, their families and supporters to be at the centre of implementing positive change. Moreover, it is intended to be a strategy, not just a set of policies, putting in place central targets, incentives and monitoring mechanisms, investment in modernizing professional practice and strengthening community leadership, and a long-term programme of developmental support, all designed to promote implementation. There is also the promise to develop this framework in the light of experience in the coming years.

Of course, in the real world, all national frameworks of this kind have significant limitations, and we are fully conscious that the 'proof of the pudding' is in the delivery. This summary does, however, describe the context within which the development of person-centred planning has become an early priority. (It is perhaps also the place to question whether *the critique* is a little too focused on improving specialist services to the relative neglect of the significance of this policy commitment to life in the mainstream.)

Implementation

The civil servants and their advisers centrally involved have described in detail their approach to strengthening person-centred planning as a key dimension of *Valuing People* (Routledge *et al.* 2002). They clearly appreciate the scale of the difficulties, and they are developing a sophisticated approach to meet them. As noted above, their answer to the first question (ensuring planning leads to positive action) is implicit in our reframing of the analysis offered in *the critique*, i.e. adopt an approach based on the six elements in the *hopeful* version while attending carefully to the six challenges in the *sceptical* version. In addition, the national approach:

- promotes the role of self-advocates and families in leading person-centred planning;
- emphasizes quality rather than quantity in problem-solving processes, which aim to achieve impact not just produce plans;
- highlights the search for ways of securing greater inclusion in mainstream opportunities and services;
- requires a 'depth and breadth' investment in training so as to both improve the effectiveness of planning processes and encourage wider cultural change in service organizations to enhance the prospects for their implementation;
- draws out the implications of more person-centred approaches for other stakeholders in the local partnerships; and
- supports all this by identifying Partnership Board responsibilities, providing guidance and support to implementation, investing in 'training trainers' and promoting lateral learning among those involved.

It can be inferred that our answer to the second question is that in the national strategy, person-centred planning functions as much more than an advanced collection of individual planning processes and tools. Policy emphasis on person-centred planning strengthens the claims of people with intellectual disabilities on access to opportunities and support, which reflect their individual aspirations. Wider informal participation in the problem-solving networks ('circles of support') broadens the base for creating innovative solutions and also the social support in facing disappointments.

On a larger scale, person-centred planning is a key vehicle for operationalizing in everyday practice the abstract principles upon which *Valuing People* is based. Its philosophy and methods are proving effective means of engaging the hearts and minds of potential allies in reform, as well as their skills. A common response to serious involvement in person-centred planning or related training is to see more clearly the gap between peoples' current lives and what could be possible: the most powerful motivation there is for making the commitment to do better. And even if the number of people experiencing real person-centred planning in each locality is fairly small in the early years, both mainstream and specialist (intellectual disability) services can learn a great deal from the choices these people make for reshaping what is offered more widely.

A virtuous spiral

Coming finally to the third question, we have already commented on the importance of understanding person-centred planning not so much as a separate tool but rather

as an intrinsic element in the wider national strategy for change. We recently shared in and gained inspiration from a detailed examination of what this might mean at the local level (O'Brien & Towell 2003). Thirty people – some of whom are the focus of person-centred planning, some are friends and family members, some facilitate these processes, some work in specialist services, some work in mainstream services and some lead local planning and commissioning – met to explore their respective responsibilities and contributions in reshaping local opportunities and support around individual aspirations, in the context of *Valuing People*.

We came to see the significance of all of us engaging across the boundaries of our own part of local systems so as to create a virtuous spiral of positive change in which, respectively:

- people make person-centred plans, which call for new opportunities and support;
- specialist services learn to play their part in implementation while shifting how they work with mainstream services; and
- mainstream services (we include here the opportunities to participate as a citizen in local communities) learn how to make what they offer available appropriately to more people with intellectual disabilities; . . . and so on as the numbers who benefit are expanded.

We also mapped how this three-way engagement needs to be pursued and connected at three different levels: at the personal level, with a focus on increasing individual opportunity; at the service level, with a managerial focus on building the capacity to offer personalized supports; and at the local public authority level (i.e. where the generic responsibility for community planning for the local population rests), with a focus on strategies for social inclusion, all being driven through concrete attention to the gains for people on the twin axes of greater self-determination and inclusion. In sum, while not underestimating the challenges, we at least are still 'travelling hopefully'.

Correspondence

Any correspondence should be directed to David Towell, Centre for Inclusive Futures, 47 Highbury Hill, London N5 1SU, UK (e-mail: david.towell@iahsp.fsnet.co.uk).

References

- Department of Health (2001a) *Planning with People: Towards Person-centred Approaches. Guidance for Implementation Groups*. Department of Health, London.
- Department of Health (2001b) *Valuing People: A New Strategy for Learning Disability for the 21st Century* (Cm 5086). The Stationery Office, London.
- O'Brien J. & Towell D. (2003) *Person-centred Planning in its Strategic Context: Towards a Framework for Reflection-in-Action*. Centre for Inclusive Futures/Responsive Systems Associates, London.
- Ritchie P., Sanderson H., Kilbane J. & Routledge M. (2003) *People, Plans and Practicalities: Achieving Change Through Person Centred Planning*. SHS Ltd., Edinburgh.
- Routledge M., Sanderson H. & Greig R. (2002) *Planning with People*. In: *Implementing Person-Centred Planning: Voices of Experience*. (eds J. O'Brien & C. L. O'Brien). Inclusion Press, Toronto.
- Sanderson H., Kennedy J., Ritchie P. & Goodwin G. (1997) *People, Plans and Possibilities: Exploring Person Centred Planning*. SHS Ltd, Edinburgh.
- Towell D., ed. (1987) *An Ordinary Life in Practice*. King's Fund, London.
- Towell D. (1997) Promoting a better life for people with learning disabilities and their families: a practical agenda for the new government. *British Journal of Learning Disabilities* 25 (3), 90–94.
- Towell D. (2000) Achieving positive change in people's lives through the national learning disabilities strategy: lessons from an American experience. *Tizard Learning Disability Review* 5 (3), 30–36.
- Towell D. (2001) *Valuing People: the Challenge for Us All*. Health Service Journal/Local Government Chronicle (Policy Briefings). Centre for Inclusive Futures, London.
- Towell D. & Beardshaw V. (1991) *Enabling Community Integration: the Role of Public Authorities in Promoting an Ordinary Life for People with Learning Disabilities in the 1990s*. King's Fund, London.