

Person-centered reviews in the USA: what are we learning?

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Introduction

“The person-centered review meeting felt like a complete collaboration between the school, parents and regional center where everyone is taking responsibility in helping Andrew achieve his potential.”

Feedback from Andrew’s person-centered review

Person-centered reviews are powerful, effective and an example of the international collaboration done by the Learning Community for Person-Centered Practices. This paper describes the shared efforts that took place, current use and future plans. Person-centered reviews are recommended practice in the UK. The latest guidance from the Department of Health recommends that person-centered reviews are used in transition and all adult services, as a way to get started with person-centered change. In the US, the first person-centered reviews with children preparing to make a transition took place in California at Tri-Counties Regional Center in 2008. More recently Virginia and Missouri have begun to explore person-centered reviews.

No matter what our role is in a person’s life (service coordinator, special educator, support staff, family member, friend) we share a common purpose of wanting to see people get the lives they want while they remain safe and healthy. The early work in the US has shown that person-centered reviews can make a contribution to this. The person-centered review process is helpful in gathering

information used in designing plans and supports to help people achieve their personal ambitions.

This paper begins with a brief history of person-centered reviews and describes a person centered review, what has been tried and learned and plans to further develop and implement person-centered reviews in the US.

The history of person-centered reviews - an example of international collaboration

The format and process for person-centered reviews has come from the work of The Learning Community for Person-Centered Practices (TLCPCP). The international membership of the Learning Community means that learning is shared and developed across continents. One example of this is the development of person-centered reviews. Some of the earliest work was done by Michael Smull and Claudia Bolton in California who used the person-centered review process for developing and reviewing person-centered plans after being introduced to this process by Bill Allen in the ‘90s. Bill Allen, in Napa California, developed a ‘wall-chart’ approach to gathering information for support planning, using questions posted on wall charts. Claudia calls this “a jump start for getting to know someone” or for use in updating a plan. Individuals who live in their own homes with support services frequently decide who to invite to their review and where to have it and even develop their own invitations. One person who loves

football, and is dieting (popcorn being a lower calorie favorite food), had an invitation that said “Please come to my popcorn planning party.” The front of the invitation showed a football player.

While powerful, this review process can at times be intensive. Helen Sanderson, another member of the Learning Community in the UK, streamlined the wall chart approach to develop the person-centered review process for gathering information from a person's support team, initially to transform the annual transition review in schools.¹ The person-centered review process is designed to be time efficient and uses person-centered thinking tools to explore what is happening from the person and other people's perspectives and to develop actions for change.

The person-centered review process

The process involves preparation before the meeting, facilitation to gather person-centered information and follow-up on the actions developed through the process. For each review, the facilitator ensures the participants (person whose review it is, supporters, family, professionals) are aware of the person-centered review process and know which information they will be asked to share.

The following headings are used in a person-centered review meeting:

- Who contributed to the review
- What we like and admire about (the person)
- What is important to (the person) now

- What is important to (the person) for the future
- What support and help (the person) needs to stay healthy and safe
- Questions to answer/issues we are struggling with
- What is working and not working from different perspectives
- Action plan.

Before the meeting, the facilitator needs to learn how the person wants to be at the center of their meeting, how they need to contribute before and at the meeting, how they will be supported in the meeting and who has been invited.

At the review meeting, the facilitator establishes the ground rules and, in an opening round, invites all participants to share what they like and admire about the person. Then participants share their contributions on wall charts that have been posted around the room (with the above information).

At the end of the meeting participants develop an action plan setting out who will do what by when. One of the errors that people make is to get so caught up in the positive aspects of the meeting that they do not address issues of health, especially if they, or the person, are uncomfortable with the particular issues. The challenge is to look at health through the eyes of the person as well as through the perceptions of the professionals involved to find a balance that works for both.

Person-centered reviews have become part of the system of supporting young people in transition and people with

disabilities in the UK. This approach is being explored in California.

What have we tried?

Person-centered reviews with children preparing for transition Tri-Counties Regional Center, California

Our understanding of using person-centered reviews in schools in the US comes from the work that has been piloted at Tri-Counties Regional Center (TCRC) in California in partnership with special education teachers and school administrators in Ventura, Santa Barbara and San Luis Obispo counties. In California, the education system has primary responsibility for planning and providing services and supports for a child with a developmental disability during the school age years. Tri-Counties Regional Center staff and special educators who are members of the Special Education Local Area Plan Agency (SELPA) started to use the person-centered review format used in the UK's school system.

In January 2008, TCRC managers introduced the person-centered review process to special education administrators in San Luis Obispo County Office of Education. This was part of an ongoing dialogue to explore how schools and regional centers could work more collaboratively to better serve young adults aged 16-22 as they made the transition from school-age services to community and adult services. SELPA administrators and several school representatives immediately took an interest and wanted to learn more. Shortly after, in March 2008, school representatives, regional center staff and families

from the three counties were invited to a TCRC-sponsored person-centered reviews workshop led by Helen Sanderson. This encouraged partnership from the beginning through learning together about the person-centered review process and its benefits for children in transition.

The first person-centered review in California was facilitated by Helen Sanderson in March 2008 with 10 year-old Kevin who attended a Santa Barbara County school. Kevin's review was held on his backyard patio with his family, teacher and two therapists participating. The review was positive and productive and the process, as well as the learning gathered from different participants' perspectives, was documented in a paper². This was shared with TCRC staff and school personnel who remained interested in the review process after having attended the March 2008 workshop. Mary Beth Lepkowsky (TCRC Organizational Development Manager), Tina Calderaro-Mendoza (TCRC Person Centered Thinking Project Coordinator), and David Mulvey (Service Coordinator) delivered training in person-centered reviews and person-centered thinking to special educators and autism specialists.

In 2009, four additional person-centered reviews were completed in Ventura County with Adam, Andrew, Sarah and Joanie, who are all transition-age young adults. In 2010 another person-centered review was conducted for Alyssa at a school newly introduced to the process.

Using person-centered reviews with adults receiving support and services

Using reviews with adults with disabilities comes from the work of Learning Community members Claudia Bolton in California, Barry Seaver in Virginia and Amanda George in Missouri. Person-centered reviews have been used for a variety of purposes in these states, including:

- to inform the required annual or six-month review of the person's support plan;
- to inform monthly or quarterly reviews of the support and services being provided (a check-in approach) and;
- helping a team change their focus from health and safety support to helping someone get what is important to him and then determining how to support him to be safe.

What have we learned?

Initial learning from facilitating person-centered reviews in school settings and within adult services has been positive and helpful in identifying how to best support people to meet requirements for the system while being person-centered in their work. What follows are ten key areas of learning about using person-centered reviews in the US.

1 Person centered review meetings are different from typical review meetings

People walk into the meeting room and hear music, see refreshments and see flip chart paper on the wall. The result of the person-centered review is information about the things that are meaningful to a person, as well as what is important for them. Action

plans are developed to implement positive change in the person's life. A manager with Community of the Good Shepherd shared her thoughts about a recent person-centered review:

“Usually we sit around the table and read the current person-centered plan and make edits as we go through the plan. This was much more interactive and focused on Brian rather than paper! I feel like we learned so much more with this process than we ever have from reviewing a document. We had no idea he knew how to play the piano let alone that he won awards when he was young. Brian's mother shared this while she told us stories about the great things about her son. We have an action step to get Brian a piano for his house!”

2 The focus is on the person and what is important to the person

This is not a new concept in person-centered planning or in person-centered philosophy but it can be difficult to maintain the focus on the person throughout the many meetings required over the years to plan for services and support. Professionals get busy, staff turnover is high, people haven't had person-centered thinking or planning training and the person-centered approach starts to drift and get focused on paper and requirements. The person-centered review process keeps the focus on the person throughout the meeting.

“I was so pleased because I believe we were able to help Adam feel more empowered by making him the center of his meeting and the decision making. His team was able to learn a great deal about Adam as a result of our person-centered review which will be critical to success when he

transitions into adult services,” says Adam’s service coordinator. Some of the feedback from the parents was that the person-centered review was “much more of an active, team-oriented approach with Adam at the center, and an action plan that seemed more specific to Adam.”

3 Person centered reviews are enjoyable!

Barry from Virginia says, “Starting a conversation with a round of what we like and admire about the person really sets a positive tone - this gets everyone involved and engaged. Participants start talking, smiling and laughing. In 20 years of participating in traditional reviews, I have never heard anyone say that they were having fun until I started facilitating person-centered reviews. Some of this also stems from using flipchart paper. By writing and drawing what is being discussed the group really stays focused and engaged.”

It is not uncommon for people receiving services to have experienced review meetings where negative issues about their behavior, or lack of progress on goals, are the focus of their meeting. In person-centered reviews this is intentionally different. For Adam’s person-centered review school staff stated that: “The whole feel was different, much more of a process than a meeting, more focused on Adam's capabilities. Adam was really tuned in to what was being discussed, able to give input and felt very proud to have everyone thinking about him.” During the review Adam demonstrated that he knew what people were talking about and that the goals were about his future.

4 The person-centered review process provides a structured way to gather information for required plans (IEP, ISP, and IPP)

Teachers and service coordinators in California noted the information gathered in a person-centered review meeting could contribute to the development of two plans for the student – the Individualized Education Plan (IEP) for the educational services and the Individual Program Plan (IPP) for services received from the Regional Center. The benefits are seen as providing more consistency in support and services from all team members attending one meeting where they share their learning and focus on action planning.

5 Ownership of the process builds sustainability

The teachers at the schools in California are beginning to take ownership of the person-centered review process. After four reviews the teachers are familiar with the process and helping to coordinate the meetings. Moreover the teachers have now supported three students in this process. For Andrew’s review, his teachers were able to assist with half of the preparation work which greatly assisted TCRC and Andrew's service coordinator.

6 Building relationships and partnership lead to positive change

Several stories we have heard about facilitating person-centered reviews focused on the importance of building relationships: trust and partnership develop among the team members when people feel listened to and respected. The foundation for successful collaboration, trust

and partnership involve listening to each other in a structured way, such as using the wall charts to gather information, looking at what is working/not working from a variety of perspectives and then developing action plans.

At TCRC, in April 2010, the people who participated in Sara's person-centered review met and discussed the relationships that had been built during the process, **"The person-centered review process can help to strengthen relationships between family, student and agencies involved. Prior to the review Sara had been reserved around her service coordinator; after the review when she sees Kristine she seeks her out, approaches her and wants to talk to her about things discussed in her review, like Sara's love of her bunny. Sara even invited Kristine over to see her bunny. Kristine shared that Sara's parents now see Kristine as not only the professional but someone who really cares, feeling more comfortable sharing their thoughts about what Sara needs, their observations and feedback. There is a different level of trust and comfort built as a result of the person-centered review process."**

For Brian, his team was so focused on having a safety plan in place to keep Brian and others in the community safe that this was all the team talked about. Whenever Brian came to a meeting or to see his service coordinator, he would automatically respond with "I've been good." Alyce, the Program Director, was troubled by this frequent response from Brian. She said this demonstrated the focus was only on what was important for Brian not what

was important to him. She convened the team to have a person-centered review with the intention of changing the focus to what is important to Brian while still ensuring safety.

Brian and his team listed what was important to him now and important in the future. They ended up with an action plan that focused on helping Brian get what is important to him: going on a date with his girlfriend, pricing a private phone line, finding a job working with animals, and playing the piano. Brian's mother was pleased to see the change in the tone of the meetings and was happy that his team members learned so many new things about Brian from one meeting.

Barry provides this example of the importance of building trust. **"A person who has spent years sitting in (notice I didn't say participating) their semi-annual review meeting in which the team discusses their life, has learned to agree to almost anything and to answer questions according to how she thinks the team wants her to answer. For example, at the last review, I asked Mary what she liked to do. She started talking about cleaning her apartment, washing her dishes and cleaning up after her cat. Then, I asked her what she REALLY likes to do. She then starting talking about knitting, going to the library, Special Olympics, attending Curves (fitness center) and going to church."**

7 Preparation is important for people to participate and contribute

One of the benefits of preparation is helping people share thoughtful information in a relaxed environment. Informing people of what information

they will be sharing during the person-centered review helps them prepare and know what to expect at the meeting. If a team member can't be present, their information can be shared from written answers to the review questions. The review questions ask people to share information about what is important to the person now and in the future. Also, people are asked to reflect on the person's life right now and share what is working and not working from their perspective. These are not simple questions and considering the questions ahead of time is often helpful.

Preparation can also provide a sense of ownership and leadership for the person whose review is being facilitated. Tina Calderaro-Mendoza from TCRC describes one example: **“Andrew also took charge of making a list and purchasing all of his hospitality items with the help of his friend Adam who had successfully gone through our first person-centered review a year ago. Adam helped Andrew understand how to prepare and what to expect in his review.”**

8 People are concerned about the time involved

The concerns shared about person-centered reviews were few, yet consistent. The learning indicates the importance of preparation before the review but some people perceive the time involved in preparing for and coordinating person-centered reviews as overwhelming. This is especially significant when considering using this process individually for 10, 20 or more people. In the work shared by

TCRC, one teacher commented before she attended the review, that she was concerned about the amount of work it would require. After attending the review she saw it differently and saw the review as do-able. However, when she shared the concept of person-centered reviews with another teacher, their reaction was that such reviews take too much time and aren't needed when the teacher has a good relationship with the family. Thus, creating the interest in spreading person-centered reviews throughout a school or agency could be challenging.

9 Change is difficult

Introducing person-centered reviews throughout an agency or system means changing how people do things. Meetings need to be conducted differently. Teams may feel comfortable with a traditional way of conducting review and planning meetings. This includes a discussion about the person's needs, goals and making sure required paper work is signed. This is not to say teams don't want to change or don't want to be more person-centered in developing plans and learning about people. It is however difficult to for people to move out of their comfort zone and make changes or gain new skills.

Consider this example from Brian's review from Amanda: **“My preparation was meeting with Brian and Mary, manager of home where he lives, to share questions that would be asked, my role as facilitator and to plan for hospitality. I also sent an email to team members describing the information we were gathering. I made a follow-up phone call to Brian's service coordinator, Lori, to**

explain the process and purpose of the review. After talking with her she was clear on why we were having the meeting; it took a conversation to help her understand the purpose.”

Additional concerns were about using the process with people who have limited involvement from their families or circle of support and fear that the actions wouldn't be implemented after the review meetings. Thus engaging all team members and building relationships are important to ensure success.

10 Coaching is critical

The traditional ways of conducting meetings are very comfortable and most teams need coaching to move beyond their comfort zone in order to practice their conversations and other information-gathering skills and to consider how they can move towards more person-centered practice in their day-to-day work.

What are the next steps based on the learning so far?

Supporting schools and agencies to use a new approach to reviews requires gathering and sharing positive stories and focusing on the outcomes while providing strategies for preparation.

The organizations pioneering this work in the US are committed to expanding the use of person-centered reviews and finding ways to address the concerns described in this paper. One possibility is for systems to use person-centered thinking tools in quarterly or monthly reviews, for

example using the 4+1 questions or using the working not /working tool³ from different perspectives.

Beyond individual reviews, in the UK, Working Together for Change⁴ requires service providers to put people using services at the heart of strategic planning and change. It is a systematic process planning for change with people using services, which provides powerful insights into what is working and not working in their lives as well as their aspirations for the future. Person-centered reviews form the basis of the Working Together for Change process.

Using the Working Together for Change process helps organizations make positive change. The information from reviews can inform strategic change. As part of a Transforming Teams initiative we are exploring how to use reviews to aggregate information from person-centered reviews to make strategic change.

Conclusion

Person-centered reviews are recommended by the UK Government to create person-centered change. Early learning in the US suggests that person-centered reviews create partnership and positive outcomes. These experiences also set the agenda for what we need to learn next: how to incorporate person-centered reviews into the system; how to address the issues of time; and how Working Together for Change can be used and adapted.

Next steps in capturing learning about person-centered reviews in the US

This paper will be further developed to share at the international Learning Community gatherings in the summer and autumn 2010. If you have experiences or information that we haven't included in this paper please contact me at amandag@helensandersonassociates.com

Notes

- 1 Person Centred Transition Reviews: a national programme for developing person centred approaches to transition planning for young people with special education needs. Wertheimer, Alison.2007. <http://www.helensandersonassociates.co.uk/media/16055/pcreviews%20book%20by%20awertheimer.pdf>
- 2 MB Lepkowsky, A George and H Sanderson, Person centered reviews at Tri-Counties Regional Center. 2008
- 3 For more information on person centered thinking tools visit The Learning Community for Person Centered Practices: www.learningcommunity.us
- 4 Department of Health, Working Together for Change: using person-centred information for commissioning. S Bennett and H Sanderson, HMSO, London, 2009 (http://www.dhcarenetworks.org.uk/_library/Resources/Personalisation/Personalisation_advice/WTFEC_Final.pdf)