Person Centered Thinking

Resource Guide
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The Learning Community
for essential lifestyle planning

Michael W. Smull & Helen Sanderson
with Bill Allen

Edited by Amanda George & Michael Steinbruck

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Person Centered Thinking

Introduction:

If people who use disability services are to have positive control over their lives, and if they are to have self directed lives within their own communities, then those who are around the person, especially those who do the day-to-day work, need person centered thinking skills. Only a small percentage of people need to know how to write good person centered plans, but everyone involved needs to have good skills in person centered thinking. These are the value based skills that underlie the planning.

The purpose of this guide is not to teach how person centered plans are written, but rather to describe the essential skills and tools needed to implement those plans and keep them alive. It is a reference for those who have had training in person centered thinking, not a substitute for training. If you have acquired a copy of this guide without training, please arrange to receive the training that you need to be successful. For information about training and who can provide it, please go to www.elpnet.net. If you have had training and need additional copies of this guide, contact the authors or go to www.elpnet.net.

As always, we welcome your feedback for future editions.

Why use person centered thinking skills?

There are a number of reasons. Using person centered thinking skills will mean that –

- the lives of those supported will improve
- you will have the skills needed for partnership
- you will have new and better and more natural ways to contribute to a person's plan
- you will be better able to use and act on the information in a person's plan
- if you use these skills daily, you will find that changing behaviors changes values
- you will more likely develop the values needed to support people in having positive control over their lives

If we want these outcomes for people who use services, then those who provide services need to have the skills required to make it happen. If the skills described in this guide are used routinely with support by management, the likelihood increases that the outcomes will be present.

5 Skills and 7 Tools:

As we continue to learn about what people need to have lives that work for them, we have found that there are a set of basic skills that those who provide supports to others need to master in order to be successful. This list is by no means complete. These are the basic skills. They serve as a foundation for more advanced skills such as building community connections and supporting dreams. One way to think about them is in the table that follows:

	SKILL	TOOL
1.	Separating what is important to from what is important for and finding a balance between them	A simple grid for recording what is learned
2.	Defining the roles and responsibilities of those who are paid to support	The "donut sort" – looking at core responsibilities, where to use judgment and creativity, what is not the responsibility of those who are paid
3.	Getting a good match between those who are paid and those who use the services	A table to record the learning and techniques to structure the learning
4.	Learning, using, and recording how people communicate (esp. with people who do not communicate with words)	A chart to record the learning and structured ways to use the chart
5.	Supporting "mindful" learning	a. Sorting what is working and not working from the perspective of the person and those around the person b. Using 4 questions to quickly and effectively record the current learning c. Using a learning log to record what is working and not working

In the material that follows we will review each of the skills and their related tools and look at how you can use each of them. This material is intended to serve as a reference for those who have had training in their use. It is not a substitute for hands-on training. If you have not had training in using these skills, find an ELP trainer who can demonstrate their use and how they are best taught. Much of your success in implementing plans that make a difference in people's lives will depend on the degree to which you (and those who manage services) understand and use these skills.

NOTE: This is a challenge. Our experience is that while the skills are relatively easy to learn, often people do not use them in their every day work. It may be helpful for you to seek out additional support from either those who taught you the skills, and/or other co-workers who have more experience in their use. The better you are at these core skills, the more likely that a person's goals and aspirations will be realized.

THE FIRST SKILL:

Sorting *important to* from *important for* and finding the balance between them.

What do we mean?

Important to

What is important to a person includes only what people are "saying":
- with their words or
- with their behavior

Remember that many people have lived in circumstances where they were expected to say what others wanted them to say. Where people are saying what they think we want to hear, we have to rely on "listening" to their behavior.

Important for

What is important for people includes those things that we need to keep in mind for people regarding –
- Issues of health or safety
- What others see as important for the person to be a valued member of their community

The Balance

The idea of the balance between what is *important to* and what is *important for* a person is rooted in the human condition where none of us has a life where we have everything that is *important to* us and none of us pay perfect attention to everything that is *important for* us. All of us strive for a balance between them. Learning what is *important to* and what is *important for* has to be done before you can help find the balance. Everyone finds that what is *important to* them and what is *important for* them are in conflict from time to time.

A way to illustrate this is to ask "when you have a bad day, do you eat or drink something fattening?" The answer from many people is yes. The next question is "what would happen if you had not a bad day but a bad year? Would you become a bigger person?" Again the answer from many people is that they would gain weight. Finally ask "what if we were tracking your weight, and after it had gone up, we came to you and said that we were putting you on a 1,200 calorie diet because of the weight gain. How would you feel – better or worse? Would you follow the diet?" Most people answer that they would feel worse and not follow the diet.

In this story people are using something fattening to comfort them after a bad day, day after day. The bad days are occurring because something that is *important to* them is not present (or things that need to be absent are occurring). Helping this person lose weight has to start with understanding why he or she is having bad days. Then after helping the person look at what can be done to decrease the bad days, you then can look at alternative ways for the person to comfort him or herself. What works for us and for those that we plan with is to look at both and then try to account for what is <u>*important* for</u> using what is <u>*important* to</u> people as the context.

Why do this?

Recognizing *important to* and *important for* is the fundamental person centered thinking skill. What we have seen over the years is that nearly anyone in need of long term services, who is in circumstances where others exercise control, has what is *important for* them addressed while what is *important to* them is often largely ignored or seen as what is done when time permits.

Those who are receiving services are often told that issues of health and safety should be *important to* them even when their behavior says it is not. Those providing the services are told that issues of health and safety are paramount and the significance of what is *important to* people is lost.

Any intervention or program designed to address what is *important for* someone without taking into account what is *important to* that person, is not adequate and will often fail. Conversely, simply saying that we support choice and paying no attention to what is *important for* people creates an environment where choice is used as an excuse for doing nothing and as a result people may be hurt. Every program and intervention must take both into account and strive to find a balance between them that works for the person

This skill must be applied daily in our work with people with significant disabilities; not only to address the presence of a disability, but also the absence of control many people experience in critical areas. We should all be trying to help people maximize the positive control they have over their lives. This means that you are helping people find the balance between *important to* and *important for* that works for them. A balance that accounts for issues of health and safety but recognizes that perfect health and perfect safety are rarely achieved and all of us address what is *important for* us in the context of what is *important to* us. Again this is a human issue, not just a disability issue.

A physician who specializes in sports medicine knows that advice to an injured athlete must include alternative ways to stay fit as well as what exercise not to do. The presence of a significant disability (especially if it affects cognitive function) makes the effort more complex. But problem solving around finding the best balance requires that people first know how to consistently separate what is *important to* from what is *important for*. It also requires that they recognize what they do not know. Those who are paid are typically operating in "crisis mode" and may look for the quick fix; and teams often assume that they know things that they actually do not know. Completing this simple one page exercise causes people to stop and think about what they do and do not know. Taking steps to find out and recognize the things we do not know is a critical part of helping many individuals move toward better lives.

When to do it and how to do it

This is a fundamental skill and you want to find and use every opportunity to apply it. It involves asking three outwardly simple questions. (What is important to a person? What is important for a person? And what else do we need to learn?) Having people stop and think about the answers helps them determine whether they are taking both what is important to and what is important for into

What is -

Important to ....   Important for ...

What else do you need to learn/know?

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TOOL

Figure #1

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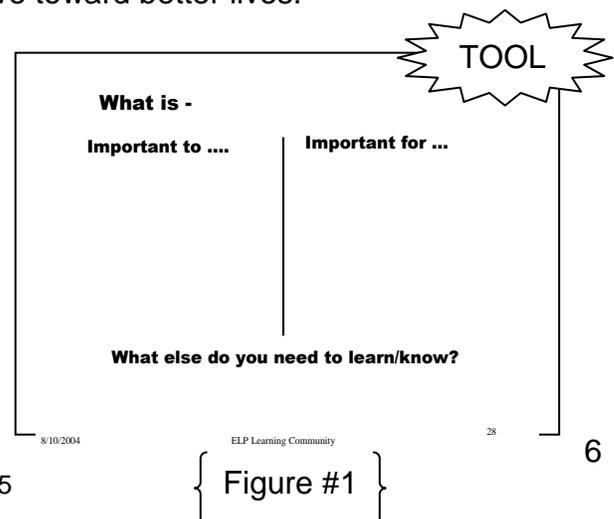
account and whether or not there are significant things that still need to be learned. People think they can do it as soon as they hear it, but we have found that they need practice and feedback.

To see if it is part of the culture of a given place, listen to the conversations. Do those who provide support use these or similar terms in their conversations? Are they describing something as *important to* or *important for*? Ask people if they think something is *important to* or *important for*? Do they have a sense for the difference between the two? <u>Listen to see if those providing the support know when they do not have enough information, or the right information, or where there is something that still needs to be learned</u>. Where people are struggling, have it wrong, or just need to stop and think for a moment, quickly sketch out something that looks like the Figure #1 and fill it out.

If this work is new to people, it often works best if you do not ask the questions directly, but rather fill it out yourself as you listen to people talk. Then based on what you heard, show people what you have done and engage them in a discussion. If it is not new to them, have everyone participate completing it. Where people appear to be confused and have placed something under a different heading than you would have, ask guiding questions rather than telling people that they were wrong. It also works better to do it quickly (taking 5 minutes or so when it is not a crisis) and often. Do not spend too much time or people may see it as taking time away from other things that need to happen. Do it frequently enough so that it will become a positive habit, but only when it will be seen as useful. Try to help people see that a brief pause to think about what we know (and don't know) is often helpful in figuring out how to support people.

THE SECOND SKILL: Defining staff roles and responsibilities

What

One of the most difficult skills, but one that is critical for achieving outcomes, is creating clarity around the roles and responsibilities of those who do the implementation. You learned a way of doing this that is referred to as the "donut" (based on the work of Charles Handy). The donut is a tool that helps staff not only see what they must do (core responsibilities) but where they can try things (judgment and creativity) and what is not their responsibility. When you are explaining the concept, Figure #2 with the concentric circles works well. When you are using it, the 3 columns work better (see Figure #3).

TOOL

Inside a Person's Life
Not Our "Paid" Responsibility
(Domain of friends)

Use
Judgement/Creativity

Core
Responsibilities

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Core responsibilities	Use judgment and creativity	Not our paid responsibility

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{ Figure #2 }   { Figure #3 }

Why
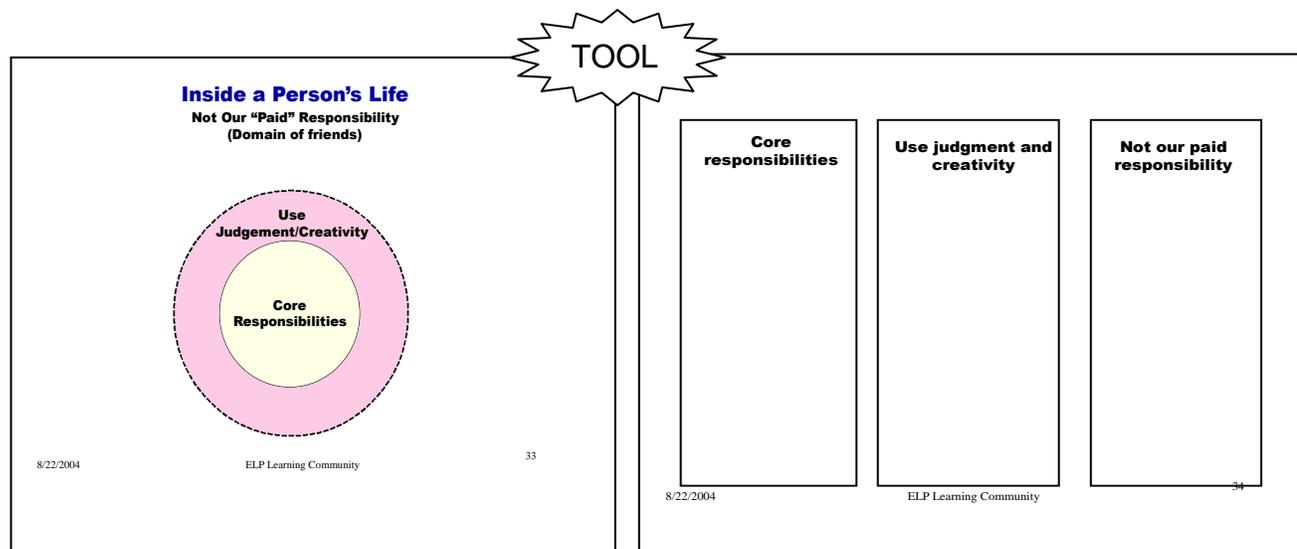
There are three broad reasons to use the donut:

1. An absence of clarity supports a blame culture
2. Staff need know where creativity is and is not expected and within those boundaries to be creative without fear punishment
3. When paid staff know what is expected of them, turnover in staff decreases

You know you have blame culture when:

* Real responsibility is avoided
* "Thinking outside the box" results in psychic decapitation (creativity is punished)
* When people try something that did not work and the response from co-workers is to cover it up or otherwise avoid blame (rather than looking at what was learned), not how to improve supports.

A strong blame culture kills creativity, distorts learning, and eventually drives out many of those you want to retain. Some aspects of blame culture are nearly impossible to avoid as looking for someone to blame when something goes wrong is endemic in our culture (just watch the news or read a newspaper). However, the effects of blame culture can be avoided with on-going

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work. Part of that work is to create clarity about what is expected of each person in their day-to-day efforts. Where creativity is both safe and encouraged, and where there is clarity regarding where it is and is not expected, you begin to address another critical issue: funding.

There will never be enough funding to provide people with all the things that are important to them. Where there is not enough money we need more creativity. We need the creativity of the person and everyone around the person. Where a strong blame culture is present, only those in senior management or licensed professionals are seen as being able to be creative. (A note of caution: While seeking more money is often a substitute for creativity; the presence of creativity will not address basic issues of under-funding.)

When boundaries are clear, an essential aspect of organizational culture is reinforced: accountability. Accountability requires that there is clarity in the boundaries of expectations. By holding people accountable for their performance inside those boundaries, the accountability culture is created. Using the donut helps provide a foundation for that accountability.

Finally, clarity about roles and responsibilities helps with reducing turnover among the staff that you want to keep. In any organization there are paid staff who you hope will stay and those you hope will leave. Creating accountability through assessing performance within clear descriptions of roles and responsibilities is a key to encouraging those who should leave to move on. It is a cliché and a reality that "bad staff drive out good staff". When staff feel they must do the work of peers who are loafing, or if they are being asked to do more when others are getting away with doing less, most "good" staff reduce their efforts or leave. Having staff who understand expectations and are held accountable to them, promotes an environment where good staff want to stay and ineffective staff are more likely to leave.

When

You should do a "donut:

- When people do not know their core responsibilities
- When people do not know where creativity is needed and encouraged
- When people do not know what is outside their area of responsibility
- When changes are made in how someone is supported
- When organizational changes are made that effect roles and responsibilities

Whenever the people who work within an organization are unclear about how to sort their responsibilities, the donut should be introduced and used until everyone is clear about the expectations for performance within their jobs. As someone's supports change, the responsibilities of the people doing the day-to-day work may change. As responsibilities change the description of what is core, where to use judgment and creativity, and what is not their responsibility should be updated. As organizations change their structures, roles and responsibilities may shift and the donut sort should be updated. While the emphasis is on the roles and responsibilities of those who work directly with the people who use services, the donut sort should be applied throughout the organization. If accountability culture is to be dominant over blame culture, then this way of thinking has to be pervasive within the organization.

How

A completed donut sort that has been done well is very clear and very useful but it is challenging to teach. However, there are some tips that will make the teaching significantly easier –

1. Start with a specific role in a specific situation. You may recall that this was the method used in the training stories used to help you learn to use the donut (e.g. You go out with Levi into the community after school. You are the person who helps Maude take her bath.)
2. Complete (with those you are helping to learn) a "what is important to, important for, and what else you need to learn" sort before you begin the donut sort.
3. Only after you have done several specific situations should you do a global donut sort about supporting a person. If you jump to doing a donut sort about a person's whole life before people have looked at specific situations (or are very skilled) those participating will tell you that all they did is reformat the plan – it will not feel useful to them.
4. Use the same technique of going from several specific situations to the general when doing a donut sort with a manager or a licensed professional.

THE THIRD SKILL: Matching staff and those using services

What

The form that you see in Figure #4 is a simple way to record what is needed to give you the "best match" between those who use services and those who provide them.   The most important part of this is the central column where personality characteristics are recorded.

TOOL

Matching staff supporting: _____

Supports wanted and needed		Skills needed		Personality Characteristics Needed		Shared common interests (would be nice to have)

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{ Figure #4 }

Why

There are 3 powerful reasons why every effort should be made to determine what a good match looks like and why every effort should be made to act on the information.

The quality of the match is –

1. One of the most powerful determinants of quality of life for people who are dependent on others for support;
2. The single greatest determinant of turnover among those paid to provide services;
3. Related to the frequency with which issues of abuse and neglect occur – the better the match the fewer issues of abuse and neglect.

When agencies look at the skills needed to support someone they typically limit themselves to the skills needed to address issues of health and safety and the general skills needed for the position. In completing this form those who fill it out should also address the skills needed for someone to have what is *important to* them as well as what is *important for* them. While having the right skills is a minimum expectation, the match regarding characteristics is critical. <u>Where there is a good match between those who are paid and those who receive services there is less turnover.</u>

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Having the skills that address the balance between *important to and for* (and the needed personality characteristics) helps create a match between the person providing the services and the person receiving the services. This is a win-win for all of the stakeholders. From the perspective of the person receiving the services, having someone with the right skills and the right personality characteristics greatly enhances quality of life, regardless of the presence or absence of a formal plan. From the perspective of the person providing the support, they are being paid, however inadequately, to have fun in a role where they feel competent.

From the perspective of the organization, having this kind of match reduces turnover as people who provide the services are getting to do what they do best. When skills and personality characteristics are matched, the frequency of challenging behaviors should decline along with incidents of abuse and neglect. (Note that when we are talking about skills in this context we are including any skills needed to help people have a balance between what is important to them and what is important for them.)

While a number of organizations already do much of this work on an informal basis, they need support in using this tool more formally. Others will agree that it is a good idea but will tell you it won't work for them. Given the clear and powerful benefits that these efforts provide, it is not surprising that the resistance comes from an equally powerful place. Where people are served in groups and a small number of paid staff work with a larger number of people, these efforts are often seen as interesting but not applicable. They do not see how they can make improvements without changing their core structures.

When working in organizations with these perceptions, you need to help them look at how they move forward incrementally. See if the match can be improved for more people even if it cannot be improved for all. Where there is a particularly bad match, see if the problem is how people are being grouped together (Give people more control over who they live with.) Recognize that it is part of a different way of thinking. If you are successful in helping people think differently, then the organization will be willing to work on changing how it supports people.

When

Helping people see the importance of a good match should be done as soon as the opportunity presents itself. Recognize that for organizations where one or few people provide services to a larger number of people, this will be a gradual process that will only be finally resolved when organizations look at the logic of how people who receive services are grouped, better rationalize those groupings, and move toward more individualized approaches.

How

You can fill this out several ways. If you simply fill it out from left to right there are caveats:

1. Under the supports needed include those things that are *important to* the person that require that the person providing the support have a skill (e.g. If someone wants to cook some of his or her own meals and needs support, the person providing the support may need to know how to cook what the person receiving support likes.)
2. Skills and personality characteristics are next to each other but are done separately. Some skills do suggest a characteristic – e.g. being with someone in the community who has occasional grand mal seizures suggests that the person doing the supporting is competent but "laid back" so that the community members witnessing a seizure see it as part of life and not something that makes you want to distance yourself. Other skills do not suggest a personality characteristic (e.g. CPR). Conversely, most personality characteristics are not connected with skills – e.g. needing to have someone who enjoys being silly may be a required personality characteristics but isn't something that we teach).
3. For people who use services in a number of different settings, you may find that you need to adapt the chart to the requirements of the settings and the result may be multiple charts – e.g. someone who is in school may need one set of skills and characteristics for a teacher (or teacher aid) and another set of skills and characteristics for someone who supports that person to go out into the community and have fun.

To complete the characteristics part of the form, you need to engage in the process that is laid out in Figure #5 below. Our experience is that this section is easy to complete when there are people who really know and care about the person involved.

Information from:		Is used to develop:
Who is closest to the person in the "people map"? Who has helped the person have good days? Who enjoys spending time with the person? What "personality" characteristics do they have in common?	Is there anyone that the person dislikes, tries to avoid? Anyone whose presence helps create bad days? Are there "personality" characteristics that these people have in common?	**Characteristics of people who best support…**

8/26/2004

Smull, Allen, & Bourne

Figure #5

THE FOURTH SKILL: Learning, using, and recording communication

What and Why

The communication chart is a simple but powerful way to record how someone communicates with his or her behavior. Everyone communicates and everyone should be listened to. Those who communicate in atypical ways are still communicating and we need to listen, understand, reply, and act. Everyone who is dependent on others for support has an especially critical need to have his or her communication understood.

While this is a critical tool to have when people do not communicate with words, it is also important to use when communication with behavior is clearer than the communication with words or when what people say and what they mean are different (e.g. a woman who would say "there's that boy" whenever she felt that she had made a mistake). A blank chart with 1st person headings and one with third person headings follow in Figure #6.

TOOL

Communication Chart– First Person

When this is happening (or has just happened)…	I do this….	It usually means….	And I want you to…

Communication Chart– Third Person

What's happening (or has just happened)…	_____ does this….	We think it means….	And others should…

Figure #6
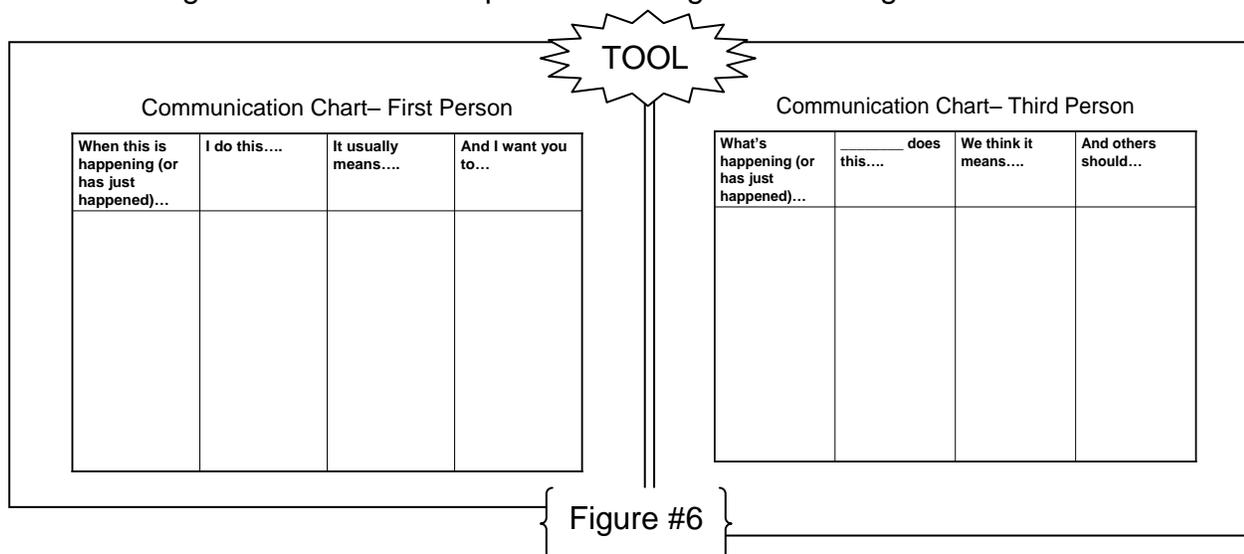
First person is more powerful but it carries with it a responsibility. Only use first person when the person whose chart you are doing is clearly in control of what is written in each column. In all other instances the chart should be completed using third person.

When and How

The communication chart should be done with any and all of the people whose circumstances are outlined above, and it should be done as soon as an opportunity presents itself. Experience has shown that getting people to see the utility and to do it is an "easy sell". The challenge is in keeping it up to date and available both to those who are new in the person's life and to those who have experiences and learning that should be added as communication changes or becomes more complex.

Because the communication chart is seen as being part of the plan it tends to "live" in the file folder where the plan is filed and not in the hands of the people who actually need it and should use it. One of your challenges is to get in the hands of those who need it and to support them in updating it as they learn.

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As you start, begin by thinking about the best way for the person to participate in developing the chart. The person should be as involved as is feasible. Some people may fill it out themselves with support. Many people are able to tell you with words when you have completed it correctly, and they can actively participate in the process of filling it in. Anyone can tell you if you have it right when you compare what is written in the chart to the behavior you see. This means that participation in chart development by people who do not use words to communicate must occur after you have a first draft. They can then 'tell you' whether your perception of their communication is correct with their behavior.

Regardless of how you have gotten input from the person, you need to find those people around the person, who are paying attention to communication, and get their input. Remember that even where the person communicates clearly with words, few of us are aware of all the ways in which we communicate with our behavior. The thing to figure out is *who to listen to.* As with other parts of the planning effort, you want to first find those people who spend time with the person, but you also want to listen to people who have a personal connection with and who care about the person. We have found the best way to find out *who to listen to* is to ask three questions –

1. What do you like the most about the person?
2. What do you admire the most about the person?
3. When did you last have fun together and what were you doing?

Listen carefully to the answers and you will find that those who have a personal connection will tell you about the person's smile, or energy, or sense of humor, and they will tell you reasons why you would want to have that person in your life. Those who have no personal connection, those who see their work as just a job, will answer with how the person makes their work easier and the nature of the relationship with the disability, rather than the person.

As you begin the communication chart, there are a couple of things to keep in mind. First, look for easy, simple, and clear communication – e.g. How do you know if she is happy or sad? Can you tell if he is angry? How do you know is she likes or dislikes something? Notice that you are not starting with the 1st column in the chart… you are starting with the 3rd. The most typical way to fill it out looks like Figure #7 below:

Communication Chart

TOOL

When this is happening (or has just happened)…	I do this….	It usually means….	And I want you to…
#3 • *The context, what is happening outside of the person* • *In the environment* • *What's just gone on* • *The "trigger"*	**#2 or 1** • *The behavior* • *What others notice* • *Can be seen, heard, and felt by others*	**#1 or 2** • What the behavior means • *What the emotions and feelings are* • *What's going on inside*	**#4** • What others should do in response • *What you want people to do* • *Or not do…..*

Figure #7

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So while it reads from left to right you fill out the 2nd or 3rd column first. You start with either the behavior, or the meaning of the behavior, and proceed as is shown. Once people become experienced with the chart they can often fill it out starting with the left hand column and working their way to the right. But when you are helping people learn, always start with the 2nd or 3rd column (what the person is doing, the behavior or what the behavior means, e.g. happy, upset).

Getting started with this can be done in several ways. You can start with a formal, 15 minute class where you:

- Show a couple of relevant examples (charts with people with similar disability and support issues),
- Explain the meaning of each column
- Go over how to start (with simple emotions, with column 2 or 3)
- Then have each member of the "class" fill out the chart on someone who doesn't have a disability label while you wander around helping people do it correctly. (Tell them they can pick their partner, child, best friend or supervisor - assuming the supervisor has an excellent sense of humor and does not manage using fear.)
- Finally begin a chart or charts for the people who are supported using flip chart paper on the wall or people working in groups at tables

You can also start informally by having copies of blank charts with you and complete it by having a conversation about the person with those who care about the person. Show people what you are doing as you do it. If you are working with people who really know the person the people you are talking with will start actively participating as soon as they understand how it works.

Getting it started is relatively easy; keeping it alive is the challenge. It needs to be used and revisited on a regular basis. One of your challenges is to encourage the development of structures that will support regularly updating the communication chart and support having a copy or copies available to the person and those supporting the person.

THE FIFTH SKILL:

Being "mindful" and recording learning: the learning log; working/not working; the 4 questions format

Structured, "mindful" learning is critical to –

- The implementation of plans;
- Having plans that change as understanding deepens (and as the person changes); and most importantly
- Having the information which tells us when services and supports need to change (as the person and our understanding of the person changes).

Because this is so important and should happen across a variety of circumstances we have provided you with 3 different tools. Each will work well, but each works best in a particular set of circumstances.

Working/Not Working: (aka - What makes sense/What doesn't make sense)

What

This is an analytic tool that supports you in looking at a snapshot in time from multiple perspectives. It is a way to analyze a situation so that you capture what is working or making sense within that situation as well as what is not working. In appearance it is quite simple – when it is completed it may be just 4 quadrants on a page. One of its functions is to help build action plans. You can use the information as described in Figure #8.

TOOL

	What makes sense **The "up" side** **What is working right now**	**What does NOT make sense** **The "down" side** **What is NOT working right now**
FROM THE PERSON'S PERSPECTIVE	USE THIS INFORMATION TO BUILD THE A G E N D A	USE THIS INFORMATION TO BUILD THE A G E N D A
FROM OUR PERSPECTIVE	OF THINGS THAT ARE TO STAY THE SAME	FOR THINGS THAT NEED TO CHANGE

Disagreements

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{ Figure #8 }

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Why & When

There are a number of times when this tool can be a powerful resource–

- When people get stuck in their day-to-day efforts and don't take a step back and look at what they are doing.
- When plans have a good description of what is *important to* and what is *important for* but have goals/outcomes that have little to do with what was learned – in other words, the plans reflect the standard way of thinking about goals for people who use services.
- When small (but important) areas of disagreement are not resolved and those who should be working together see only the other's lack of understanding and appreciation of their position.
- To help prevent us from inadvertently changing aspects of a person's life that are working and are important to them – to help us understand the things that are working about a given situation before we begin to make changes to it.

In all of these circumstances the "working/not working" analysis will help if it is done well. If it has enough detail and if each person's perspective is adequately addressed, then –

- It helps people gain perspective - to pause, step back and see the forest as well as the trees. This is especially helpful when people are just learning person centered thinking skills and easily revert to their "old" way of thinking.
- It serves as a bridge between what was learned about *important to/for* and action planning
- It helps get people unstuck as it contains 2 of the core principles of negotiation -
  1. When you get each person's perspective on paper they feel listened to;
  2. When you tease situations apart in enough detail you can find areas of agreement. This enables you to start with "common ground"
- It increases the odds that we can make a situation better through change by using those aspects that still work to the person's advantage. It saves the baby from being thrown out with the bath (e.g. Cole hates living with his parents but he still wants to see them often and he must live within 15 minutes of them in the same town).

How

This analysis works best when it is focused on just one part of someone's life. When you try and cover the entire spectrum of someone's life it looks like a summary of the plan. To determine where to focus, think about what the plan set out to accomplish. Look at what you recorded under things to figure out/questions to answer and then start with an area or aspect of the person's life. It can be as focused as looking at what is working and not working when helping the person bathe. It can focus on a block of time – e.g. look at what is working and not working in the morning. It can look at a broader part of someone's life – e.g. what is working and not working where someone lives. It can also focus on an "event" – e.g. what did and did not work about the respite services received.

Once you have selected an area to focus on, decide if it would work best to do it on your own or as a group with paper up on the wall. It can easily be done on a sheet of paper in your lap. This works well in less formal settings where people are stuck and you want to reinforce the

importance and power of mindful learning. Just divide the paper in the 2 columns with enough rows to reflect the various perspectives present. Then have a conversation that generates the information. When people are arguing, you may want do this quietly while listening and writing (with a few clarifying questions). You can then get people to move forward by sharing what you wrote.

In more formal settings (e.g. - reviews of services, planning meetings) it often works to have paper up on the wall. Start with 2 pages per perspective – one for *what is working* and one for *what is not working.* Post all of the pages by pairs in a row. Note that it helps to have all of the headings that you see in Figure #8 already listed on the top of the appropriate pages. It is suggested that you use all the headings (what is working, the upside, and what makes sense) as each resonates differently with different people.

Some people who work with teenagers have even "translated" the headings into current slang and found that they work better. Always put the person's perspective as the 1st pair and family (if needed as 2nd). Having as many as 3 perspectives is common (e.g. the person, a family member, and staff; or the person, the residential staff, and the day staff). More than 3 perspectives are possible but the power of the process starts to break down as people are unable to easily compare one perspective with another. If the person cannot tell you directly what his or her perspective is then write "our guesses about _____'s perspective".

Giving people markers and having them get up and write on the sheets reflecting their perspective is the fastest way to complete the work. However, this assumes that people have some idea of what they should be addressing. To expedite this it often helps to have the area of focus written up – e.g. what is working/not working about mealtimes? In instances where this is new it often helps to start each perspective yourself (ask questions of the various stakeholders, clarify the responses, and then write). After you have 1 or 2 items per perspective, give the marker(s) to those whose perspective it is. Where the person with whom you are planning is unable to write, have someone support her or him. Where they cannot communicate with words see if there are 2 or 3 people who can arrive at consensus about their guess with regard to that person's perspective.

Once the sheets are filled out rearrange them to look like Figure #8 above. Ask yourself and the group if the things that *don't make sense* can change. Also identify what should be changed but will take more time. If you are doing formal planning this will lead to an action plan that goes in the record. If any case, the process still needs to end with specific commitments about who is doing what by when.

TOOL   **The 4 Questions (plus 1):**

What & How

The 4 questions are – "Since the last time we got together –

1. What have you tried?
2. What have you learned?
3. What are you pleased about?
4. What are you concerned about?

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This is a simple but powerful tool for those who provide supports. The questions are useful when meeting in order to gather the team's collective learning in a way that leads to answering a fifth question –

5. Based on what we know, how should we move forward

The process is straight forward. Each of the 4 questions is posted on a sheet of flip chart paper and as people arrive for the meeting they are given a marker and asked to write on each page. Our experience is that the 1st few times that people do this it is awkward, but that after that people know what to expect and are thinking about the questions before they arrive. Everyone must be comfortable with writing; they must feel that spelling and grammar do not matter. Anyone who feels that they cannot write should be supported by having someone write for them. If the person being supported is present, then that person needs to be supported in having his or her thoughts posted as well. This may require some advance preparation and may also require that someone write for them.

Why

Starting meetings with this simple activity accomplishes a number of things –

- It prevents a "dominant voice" from drowning out the learning of those who are not as assertive in making their views known.
- It makes everyone feel that they were listened to
- It brings forward issues that might have been overlooked
- When it is time to move forward the group has a picture of their collective learning to draw on
- It serves as an easy way to update plans
- Where plans have not been started, the information from these answers will give the planner much of what is needed in areas, such as, what is important to the person and what others need to know and do to support the person
- It reinforces planning as a process
- It reinforces a positive habit – that of valuing mindful observation and learning

When

This can and should be started whenever and wherever there is sufficient support for it to be successful. This is a helpful process whenever a group of people gather to talk about the supports and services that a person is receiving. You do not have to wait for people to have plans. A skillful planner can build a plan on what is written here by moving the information into the appropriate sections of an ELP.

The Learning Log:

What

The learning log is used to replace some traditional notes or records. The idea is simple. Where learning should be taking place in the course of an activity, this provides a way for those engaged in the activity to record what they learned – focusing on what worked and what didn't.

Learning logs were developed so that staff could record learning but have since been adapted so that those who are using the services can record their learning as well. The 2 most common formats are as follows:

TOOL

Charlie's Learning Log

| Date	What did the person do? (What, where, when, how long, etc.)	Who was there? (Names of staff, friends, others, etc.)	What did you learn about what worked well? What did the person like about the activity? What needs to stay the same?	What did you learn about what didn't work well? What did the person not like about the activity? What needs to be different?
3/1	Hillsboro Aquatic Center for hot tubbing (2 hours)	Charlie, Aaron, John, Trina and two strangers	He liked the long warm soak part. The hot tub temperature is set at 105 degrees, which is not too hot for Charlie. Charlie especially liked floating on his back with Aaron's support. We saw lots of smiles and a very relaxed Charlie.	Charlie did not like getting rain on his face when we were getting in the van. We need to take an umbrella when we go out on rainy days. The lift was not available when we arrived at the center. Call ahead next time. (503-648-9884)
3/4	Fishing at Hide-a-way resort (2.5 hours)	Charlie and Aaron	He liked catching the trout and got so excited he didn't want to leave. Charlie liked the hot cocoa & cookies we shared.	We need to figure out a way for Charlie to hold his pole more on his own.
3/5	Neighborhood walk (30 min)	Charlie, Trina, Aaron	Charlie likes to greet the dog at the corner of 5th and Jensen. We stop for about 10 minutes each time we walk.	Today, we tried to go a different way. Charlie was not happy until we turned around and went down 5th 1st. Take a dog biscuit next time!
3/5	Reading with his new glasses (1 hour)	Charlie and Mrs. Endicott	Mrs. Endicott and Charlie read a fishing magazine "Northwest Fishing". He loved having Mrs. E to himself for a little while! They had lunch together also. The glasses really help Charlie see the pictures.	He was not interested in the car magazine she brought. Not sure if it was because he was hungry or because he wasn't interested in cars.
3/6	Shopping in downtown with a walk (1.5 hours)	Charlie, Don, and Judy	Charlie got very excited and yelled out a few times when we were looking at video games at Electronic Salon. A woman in the book store took special interest in Charlie and helped us find books on fishing (at Dottmis).	Construction at the mall downtown (Pioneer Square) made our time not as fun. There were lots of detours & narrow paths and the smell of some fumes made Charlie's eyes water and caused some discomfort.

{ Figure #9 }

The version in Figure #9 was developed in Oregon and works well to record the learning of staff. The version in Figure #10 was developed in the UK and works equally well in recording the learning of the person using services.

TOOL

Learning Log

things I have been doing

Date	What I did	Who was there?	What was good?	What was not good?
	Think about: • When it was • Where it was • How long it was for	Think about: • Did you like them being there? • Who else would you have liked to be there?	Think about: • I liked ..... • I felt ......, • I want more ..... • I learned	Think about: • I did not like ...... • I felt ......, • I want less ...., • I learned

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ELP Learning Community

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{ Figure #10 }

If the person who uses services is completing the learning log themselves, use the following instructions:

'Things I have been doing....' Things to remember not listed in heading

TIPS

- This record belongs to the person who is filling it in and should be useful to them. This must be clear to them as should the reason they are completing the record. No one should be coerced to complete it if they do not want to

- Use photos as you support the person to complete the record - photos of what they are doing, of the person themselves, who they did it with etc. these will be a really useful way of remembering with the person what they did and how they felt about it

- Talk to the person about the format they want to use to complete the record. Something like a scrap book, photo album or loose-leaf file might be the easiest way of collecting lots of photos alongside writing

- This is not another record keeping exercise for the service that support the person

- The process of talking about what the person has been doing is as Important as the product of recording it

- When you are completing the record with the person, help them to think about how they felt when they were doing what they were doing. It may be useful to use photos of different facial expressions to do this

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Why

Typical notes found in the records of people who use services are intended to document that what was supposed to happen did happen. The facts are recorded, the answers to "when, what, who, how long" questions. In those instances where learning is recorded, it is often buried in a long narrative. Those who are doing the day-to-day work with the person are learning, and often what they are learning is critical information about the person. Unfortunately, because that learning is either not recorded or not recorded in an accessible format, it gets lost. The learning leaves when the person leaves. The people in Oregon who developed the learning log did it when they heard about the learning that Amy's nurse had done. Amy hated medical appointments. The nurse that worked with Amy recorded what happened at her medical appointment but not what she did to help Amy cope with waiting. Rather than have Amy wait in the doctor's office, she had taken her through a drive through car wash. Amy, who did not communicate with words, was happier and more excited in the car wash than anyone had ever seen before. The creative and skillful way that this nurse supported Amy was not part of her nursing notes until the learning log format was developed.

Acting on this kind of learning can have a substantial impact on the quality of life for people with severe disabilities using long-term services. However it can happen only if the learning is valued, recorded, and acted on. Sadly, it is rare that we ask people who use services to record

their learning, even though many people are capable and interested in doing so. For those people, the second format gives them a way to do it.

When & How

This is a powerful and helpful tool. However, it will not work in all circumstances and it will not work without appropriate training and support. In situations where people are trying new things or are new to the person receiving the support, these formats work and work well. To ensure ongoing effectiveness, someone needs to help the people using the log to sort *what is working* from *what is not working.*

Obtaining this skill requires that people see it performed and that they have opportunities for structured practice. Where the same people are doing the same activity in the same circumstances over and over, the learning log will slowly lose its power and purpose. Having someone monitor effectiveness helps people move to an alternative format when entries no longer reflect new learning. For the learning log to work over time, those recording the learning must to see their ideas and observations being put to use. Otherwise, it will become another empty ritual.

The information from the learning log has to be used in the same way as the "working/not working" information is used –

- Those things that are working contribute to our agenda for what needs to be maintained
- Those things that are not working contribute to an agenda for change

Most people find that it is best to transfer information from the learning log directly to the plan. This makes it readily accessible and retrievable and ensures that it is put to practical use. For this to happen, someone needs to take responsibility for moving the information and also looking for patterns in what emerges. Often questions about why someone is doing something are answered only when you look at learning over time.

Think about how to start in the organization where you work. Look at the graphic in Figure #11 that follows; download a full size copy from www.elpnet.net and see how you can make use of these skills.

Seven Tools:

TOOL	WHAT IT DOES	A QUICK VIEW	POSSIBLE USES	HOW WILL YOU USE?
Sorting Important To/ Important For	A way to sort What's Important To and What's Important For while working towards a good balance.	Important TO / Important FOR Need to learn/ know	• To think through a situation before deciding what should happen next • As an everyday tool	
The Donut Sort	Identifies role-specific responsibilities. (core responsibilities; use judgment and creativity; not a paid responsibility)	Core responsibility Use creativity and judgment Not our paid responsibility	• Help staff get clear about their responsibilities • Develop job descriptions • A structure for feedback and evaluation	
Matching Staff	A structure to look at both what skills/supports and what "people characteristics" make for good matches.	Supports wanted and needed / Skills needed / Personality character needed / Shared common interests	• Help people think about the kind of staff they want and need • Hire best matched staff • Help to build community connections	
Communication CHART C H A R T	At-a-glance view of key information about how a person communicates. Especially useful in supporting people who don't communicate well with words.	What is happening _____ Person does _____ We think it means _____ And we should _____	• For people to get to know a person more quickly • Help people know how to support someone during challenging times	
Sorting What's Working/ What's Not Working	Analyzes an issue/situation across multiple perspectives. Provide a picture of how things are right now.	Working / Not Working Perspective #1 Perspective #2 Perspective #3	• To do pinpoint problem-solving • Before planning next steps • To get a broader perspective	
4 + 1 Questions	Helps people look at learning from their efforts. Given that learning, a way to focus future efforts.	1. What have we tried? 2. What have we learned? 3. What are we pleased about? 4. What are we concerned about? 5. Given what we now know, what's next?	• To evaluate a specific process or effort • As a structure for group review	
The Learning Log	Directs people to look for ongoing learning. A structure that captures details of learning within specific activities and experiences.	• What? • Who? • What did you learn that worked well? What should stay the same? • What did you learn that didn't work well? What should change?	• Replace the standard "progress note" • Track efforts related to a specific focused area of change • Deepen learning over time	

Person Centered Thinking Tools Version 2.0   A Collaboration between OTAC and the ELP Learning Community   Graphic by Marc Archambault   8 September 2004

{ Figure #11 }