

Idaho Person-Centered Planning – Model Requirements

Introduction

It requires a major cultural shift to change hearts and minds. The key to success in planning is seeing the adult (i.e.: the focus person) as the driving force behind choice, preference and communication styles of both the process as well as the final plan. The focus person may rely on a team of support people to communicate his or her priorities – that's ok. Person-centered planning in Idaho will be individualized to the needs of each focus person. For the purposes of these recommendations, we chose to use "individual" as our key word for an adult engaged with the planning process.*

** Individual would include the assistance of the person's guardian as appropriate.*

1. **The individual leads the process** (what the customer wants/vision). "Leading" will look different for different people. The individual...
 - a. Chooses the Planning Facilitator
 - a. Decides how the PCP meeting will happen: who will be invited, where and when the meeting will take place, and what will be discussed.
 - b. Identifies who is in their Circle of Support and on their Person-Centered Planning Team
 - i. Circle of Support: People who the individual invites to be part of the meeting. People who the individual feels will support, and speak for, their desired vision for their life.
 - ii. Person Centered Planning (PCP) Team: People who have been invited by the individual to be part of the planning process. Would include the guardian as an invited member having a specific role and others who have responsibility to implement the plan.
 1. Guardian¹: Facilitator needs to get information about the authority/scope of guardian's responsibilities for the individual to understand the parameters at the beginning of the PCP process. If there is conflict between the individual and their guardian related to the individual making decisions and leading this process, the Facilitator will utilize conflict resolution or refer the individual to

¹The Idaho Supreme Court is exploring potential refinements to rules and processes around guardianship in Idaho. Information about the system, training for guardians and complaint forms can be found at: <https://isc.idaho.gov/guardianship/guardianship-conservatorship>

additional resources.* Guardian is provided information about the Person-Centered Planning process and how the individual will lead the process.

**If there is conflict between the individual and their guardian related to the scope of the guardianship, the facilitator will refer the individual to additional resources for support.*

- c. Works with PCP Facilitator to begin to identify additional needs or supports.
 - i. Optional Self-Advocacy Training
 - ii. Peer Mentors
 - iii. Expanding the Circle of Support
 - iv. Education for the guardian to understand their role in the PCP process
- d. Reviews their plan and services on a regular basis, then provides information to their PCP Facilitator, Circle of Support, and Medicaid about how the planning process and their supports and services are working for them and what needs to be changed or improved.

2. The Person Centered Planning process allows time for face to face preparation between the individual and Planning Facilitator

Facilitator and individual develop a relationship that leads to an understanding of the communication style, preferences and strengths of the individual. "In the case that an individual does not use a typical means of communication (i.e., verbal language, augmentative device, sign) the Facilitator may conduct observations in an individual's home and in the community.

The Facilitator may also conduct interviews with the individual's family, friends, and, support staff to better understand the person's communication system.

- a. In addition, the PCP Facilitator will have access to experts in communication as needed on a case-by-case basis.
 - i. Identify, understand and use the most effective/preferred communication methods
 - ii. Include people who know the person well if the individual wants them to be there
- b. Establish accommodations the individual needs to lead
- c. Education for individual and their Circle of Support to be able to support informed decision-making by the individual
- d. Have a dedicated and meaningful discussion of rights

- e. Make sure the individual understands the process
- f. Make sure the individual is able to practice for the meeting to the individual's satisfaction

3. Qualified Planning Facilitators support the individual and facilitate the PCP Process. Duties and requirements for a qualified PCP Facilitator include:

- a. Complete required training
- b. Achieve credential (to be determined)
- c. Has proven competency (to be determined)
- d. Work for the individual
- e. Advocate for the individual
- f. Facilitate conflict resolution when necessary
- g. Prepare others (including natural supports) to understand how the individual will lead
- h. Prepare Circle of Support members to understand their role
- i. Prepare and provide materials and documents in plain language and accessible formats
- j. Encourage involvement of direct support providers if the individual requests it
- k. Coordinate and facilitate the meetings in the way the individual desires and so everyone understands
- l. Document the discussions and results of the meeting

4. The planning process will focus on the individual and the individual's dreams.

- a. The process focuses on the individual – their dreams, strengths, gifts, interests, ways to contribute to community, desired employment, life goals - not deficits or limitations.
- b. Focus on leveraging an individual's strengths and abilities to achieve their dreams.
- c. The process supports informed decision-making by the individual and offers informed choices to the individual regarding the services and supports they receive and from whom.
- d. The process respects each individual's autonomy and self-determination to make choices for himself or herself about their health and care even if others don't approve or if they consider the choice

unsafe. Service providers must help individuals monitor their plan based on the individual's choices and preference. Planning for risk may be needed during the process and might include...

- Conducting a risk assessment
 - Balancing personal choice with health and safety through a supported decision-making process
 - Ensuring supports and services are based on individual choice
 - Recognizing individual responsibility
- e. The Circle of Support provides input into steps to achieve the individual's vision for their life but does not define the vision/goals.
- i. Provides ideas about resources, paid and unpaid support
 - ii. Identifies possible connections in the community and those who can help make those connections

5. The Person Centered Planning process will be adapted to the culture and language of the individual/participants.

- a. Reflects cultural considerations of the individual and team members
- b. Information is provided in plain language, in a manner that is accessible to the focus person, and in the main language of the focus person/their family who do not use English as their primary language [42 CFR Chapter IV 435.905(b)]

6. The Person Centered Plan will reflect the individual's vision for their life.

- a. Connects to the individual's vision for their life, and the ways the individual wants to spend their time, with opportunities to do so.
- b. Looks outside of the service system to identify and carve out meaningful opportunities in the community, including employment, that align with individual strengths and preferences.
- c. Identifies relevant paid and unpaid supports chosen from a variety of providers, supports, and services available to the individual.
- d. Final documentation of the PCP meeting/process is agreed to, with the informed consent of the individual in writing, and signed by all individuals present, especially those who have committed to actions steps identified during the process.
- e. Identifies the individual and/or entity responsible for monitoring progress on action items identified in the plan.

- f. Is distributed to the individual and other people involved in the plan.
- g. Individual Service Plan/Support and Spending Plan is built to support the Person Centered Plan (not vice versa). Information from the Person Centered Planning process is included in the development of the ISP/SSP.

7. All materials, tools and documentation will be produced in plain language and accessible formats.

- a. Materials are provided in accessible formats, including graphic/visual-based information.
- b. The individual has a copy of their plan in a format that makes it easy to share information and knowledge with people providing their support.
 - i. Expectation that support staff will engage in this information sharing process.

8. Person Centered Thinking Training is provided to stakeholders as part of person centered system and process.

- a. Person Centered Thinking Trainers are trained using an identified best practice model for training and content.
- b. Person Centered Thinking training is provided on a regular schedule in each region of the state.
- c. Training participants may include Idaho Department of Health and Welfare (IDHW) staff, service providers/direct support staff, Circle of Support members, family members, guardians, individuals with disabilities, and members of the public.
- d. Announcements about the training are posted to the public and potential training participants may be referred by a variety of entities, including PCP Facilitators.
- e. Training is provided at no cost to training participants.