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Person-Centered Planning and the Quest for System Change

Chapter 4 for

Martin Agran, Fredda Brown, Carolyn Hughes, Carol Quirk, & Diane Ryndak, Eds.

21st Century Issues for Individuals with Severe Disabilities: Ensuring Quality Services and Supports in Challenging Times

John O'Brien

58 Willowick Dr

Lithonia, GA 30038

Address correspondence to: John O'Brien johnwobrien@mac.com

TASH advocates deep change in typical service practice in its position statements on Community Living (2011) and Integrated Employment (2009). These statements, which are the most recent expressions of positions that reach back to the organization's early history, converge with *The UN Convention on the Rights of Persons with Disabilities* at Article 19, *Living Independently and Being Included in the Community*, and Article 27, *Work and Employment*, which adds the moral force of a world wide consensus of advocates, experts and politicians to the weight of international law in those nations who are party to the convention. Article 19 provides the right to choose where and with whom one lives with the personal assistance

necessary to support inclusion in the community and prevent isolation or segregation from the community. Article 27 provides the right to an opportunity to gain a living by work freely chosen in a labor market that is open, inclusive and accessible. As of this writing the US has signed but not ratified the Convention; however, these two Articles are largely consistent with long-standing US policy. In this chapter, “TASH values” is short hand for these two outcomes: people live included in community life as occupants of their own homes and holders of integrated jobs.

Progress toward realizing these rights can be marked by steadily growing numbers of people with severe disabilities inhabiting their own homes and filling contributing roles in the life of our communities, especially individualized jobs in integrated settings. Available measures of the current performance of US services to adults with developmental disabilities indicate the numbers of people whose circumstances will change substantially if we are serious and successful in making these rights real. Fewer than 30% of people with developmental disabilities receiving residential support in the US in 2010 lived in a place they or another person with developmental disabilities owned or rented (states report a range from 2% to 85%) (Larson, et. al, 2012) and 20% of all adults funded by US developmental disability services were in integrated employment (states report a range from 5% to 88%) (StateData.info, 2012). As well, the Council on Quality and Leadership reports that only about a third of 7,800 interviewed as part of their accreditation process perform social roles in their communities (CQL, 2010). None of these accounts differentiate the situation of people with severe disabilities and none has anything to say about the quality of people’s home or work life, but they indicate the quantitative breadth of change that systems must undertake and the distance that services must travel. To get a good sense of the quality of the person-centered work required to support people to exercise choice in their home life, read Chapter [\[15\]](#) of this volume by Lyle Romer and Pam Walker.

Person-centered-planning figures in many efforts to reform systems from New York to New South Wales. (In this chapter, the term system means the whole network of policies and practices concerned with assistance to people with severe disabilities. This network is reproduced and changed by the interaction of people with disabilities and their families and allies, advocacy groups, service providers, administrators charged with services and legislators and courts as they take an interest in policy and resources for people with disabilities.) The US Centers for Medicaid and Medicare Services has promoted person-centered planning in initiatives to shift the balance of long term care from institutions to community services since at least 2001(NHPF, 2008) and it has been central to policies aimed at transforming English services to people with intellectual and developmental disabilities since 2000 (Routledge, Sanderson, & Greig, 2002). This chapter reflects on the functions person-centered planning has been assigned in various system change efforts, the impact it has had and lessons its practitioners have learned. This reflection informs what it will take to deliver fully on the promise of real choice and inclusion at home and at work.

Approaches and Contexts

Diverse approaches identify themselves as person-centered planning. Box One identifies nine common approaches to person-centered planning. Though each approach has continually refined its practices over time, these approaches to person centered planning are not new (Lyle O'Brien & O'Brien, 2002). TASH's 1991 account of critical issues included a chapter that drew on ten years experience of the construction of stories that led to action for inclusion through an organized search for capacity in people with developmental disabilities, their families and allies, and their communities (O'Brien & Mount, 1991). Over time, services and systems have adapted some of these practices and incorporated them into their individual planning

processes and reform efforts, often labeling the result a person-centered plan. From its beginnings, smaller numbers have used person-centered planning to guide and coordinate people's efforts to create new, contributing community roles.

Box One: Some Common Approaches to Person-Centered Planning

There are many reasonable approaches to person-centered planning; these are the most common and the most commonly adapted to fit other's styles and situations.

Approach	Some Defining Features
Personal Futures Planning	Aims to generate powerful images of a rich life in community that will guide a search for opportunities for the person to take up valued social roles & develop service arrangements to support the person in those roles. Collects & organizes information by looking through a set of <i>windows for change</i> , which describe, for example, the person's relationships, important places, things that energize the person, the person's gifts & capacities, & ideas & dreams of a desirable future. (Mount, 2000)
Pathfinders: Group Person-Centered Planning	A group-of-groups (5-8 focus people with their families and allies) support one another to make, implement & revise individual Personal Futures Plans. Emphasis on taking action toward a desirable future in a community setting before seeking services. Mutual support grows with shared discoveries, questions & resources. Large group meets once to plan and then quarterly for at least a year to share learning & revise plans. Groups do their own facilitation and recording with guidance from large group facilitator. Commonly used when people share a life transition, such as moving from school to adult life. (Lyle O'Brien & O'Brien, 2002; Mount & Lyle O'Brien, 2002).
Make a Difference	Application of Personal Futures Planning to a way to build organizational capacity by developing learning partnerships between a staff member and a person supported aimed at developing a contributing community role for the person. (O'Brien & Mount, 2005)

Approach	Some Defining Features
PATH	A group process for discovering a way to move toward a positive and possible goal, which is rooted in life purpose, by enrolling others, building strength, & finding a workable strategy. (O'Brien, Pearpoint, & Kahn, 2010)
MAPS	A group process for clarifying gifts, identifying meaningful contributions, specifying the necessary conditions for contribution, & making agreements that will develop opportunities for contribution. (O'Brien, Pearpoint, & Kahn, 2010)
Support Plans	A way to mobilize all available resources to support a person's citizenship. Based on six keys to citizenship: self-determination, direction, money, home, support, & community life. (Duffy, 2004)
Essential Lifestyle Planning (ELP)	Asks what is important to and for a person in everyday life. Specifies the support the person requires and person-specific ways to address issues of health or safety that balance what is important to the person & what is important for the person. Clearly identifies opportunities for improved assistance. Guides continuing learning about the person's supports in a way that is easily understood by those who assist the person. (Smull & Sanderson, 2005).
Person Centered Thinking Tools	A set of tools deconstructed from ELP, adopted through whole organization training, that develops the skills and behaviors necessary to think and work in a way that delivers person-centered support at the direct support, agency management & system management levels. (Sanderson & Lewis, 2012)
Facilitated Discovery	A systematic process of answering the question "Who is this person?" that generates a rich background for negotiating a customized employment role. Focuses particularly on people failed by typical methods for supporting employment (Callahan, Schumpert, & Condon, 2011).

Two distinctions are important for understanding the differing contributions that person-centered planning can make to people living in their own homes and working in real jobs: the difference between working in a system and working on a system (Deming, 2000) and the difference between technical problem solving and meeting adaptive challenges (Heifetz,

1998). In some contexts, person-centered planning is a way to work in the system, implementing and improving procedures to perform system defined and regulated functions according to its rules. In other contexts, person-centered planning is a way to work on the system, revealing, testing and reshaping typical patterns to suit new purposes. Working in the system makes sense when the system reliably produces assistance to people in their own homes and jobs. Working on the system makes sense when we need to learn new ways to pursue these purposes, which differ from the purposes most current services were structured to serve. When the change necessary to support new purposes is a matter of correct application of expert knowledge to a clearly defined problem, the change can be called technical. When new ways must be found to navigate uncertain territory and when a common understanding of purpose and ways of proceeding must be negotiated among people and organizations with different interests who face real losses, the necessary change can be called meeting an adaptive challenge.

In practice, person-centered planning is a means to identify important future possibilities and coordinate action that moves toward that future. The horizon of possibilities identified and the extent of social learning mobilized to move toward those possibilities varies with context. Box Two outlines six contexts for person-centered planning in terms of function, the main actors who meet productively when the process works, the initiator and owner of the process, and its intended benefits.

Box 2: Contexts and Functions for Person-Centered Planning

Function	Actors	Initiator	Intended Benefit
<p style="text-align: center;">I</p> <p style="text-align: center;">Service Planning</p> <p>Define outcomes Choose service provider (or self-management) <i>Working in system.</i> <i>Technical change</i></p>	<p>System management engages Person*</p>	<p>System service coordination</p>	<p>Best fit between person and available service options and providers Best available service option at points of life transition (e.g. leaving school; leaving family home; moving from institution or nursing home) Good mix of paid & unpaid ('natural') assistance Agreed, individually referenced measure of outcomes</p>
<p style="text-align: center;">II</p> <p style="text-align: center;">Support Planning</p> <p>Identify goals and specify service offerings <i>Working in system.</i> <i>Technical change</i></p>	<p>System Management and Person engage Service Provider</p>	<p>System service coordination, typically as (part of) Individual Service Plan (ISP)</p>	<p>Mutually agreed goals, roles, procedures & schedules that reflect individual choice as much as possible within existing service offerings Regular, required update of goals & service offerings Provider appreciation of personal history and preferences.</p>

Function	Actors	Initiator	Intended Benefit
<p style="text-align: center;">III Service Improvement</p> <p>Improve quality of existing service offerings by adjusting service offerings to changing conditions and opportunities <i>Working in system. Technical change</i></p>	<p>Service provider engages Person</p>	<p>Service provider or system reform process</p>	<p>Best fit between person and day to day routines Effective framework for identifying and pursuing opportunities for improvement Assistants and their managers better informed about the person → greater potential for good relationships</p>
<p style="text-align: center;">IV Customized Employment</p> <p>Discover the basis for negotiating employment <i>Working in system. Technical change</i></p>	<p>Employment Facilitator engages Person + Network</p>	<p>Employment Facilitator</p>	<p>Identification of interests and capacities that are of economic value to an employer as an integral part of negotiating customized employment.</p>

Function	Actors	Initiator	Intended Benefit
<p style="text-align: center;">V</p> <p style="text-align: center;">Innovation Through Partnership</p> <p>Generate innovation in service offerings: new roles supported in new ways <i>Working on system. Adaptive Change</i></p>	<p>Service innovator engages Person</p>	<p>Service innovators seeking partners in learning through action or person negotiating a new service arrangement</p>	<p>Learning that produces more individualized supports fit to what could be for person + community Pathways to new and valued social roles Co-production of new service capacities through strong & sustainable relationships</p>
<p style="text-align: center;">VI</p> <p style="text-align: center;">Person & Family Generated Action-Learning</p> <p>Pursue a good life in contributing community roles <i>Working on system. Adaptive Change</i></p>	<p>Person + allies engage community settings and, when necessary, support providers often with assistance of independent facilitation</p>	<p>Person + allies</p>	<p>Action arising from deeper understanding of person's emergent future Pathways to contributing community roles Establishment of desired partnership with service system and providers Best use of individual budget</p>

*In many cases "Person" includes family members.

Given the gap between what TASH values and what most people who receive services currently experience, person-centered planning will make its greatest contribution when those involved are working on the system to generate adaptive change. The difficulty of working this

way means that the contribution of person-centered planning is profoundly contingent on the values, purposes, commitments, relationships and creativity of those who practice it.

Most person-centered plans happen as a matter of routine when people join the developmental disabilities service system, make a transition that calls for a change of services or meet requirements for an annual individual service plan. Context I, **Service Planning**, and Context II, **Support Planning**, modify previous procedures for producing individual service plans. Both of these contexts are owned by the service system, at least to the extent that the terms of people's participation are governed by system rules and routines. Context III, **Service Improvement**, includes intentional efforts to improve the quality of existing services by discovering more about how people want to live and adjusting services and policies to offer a better fit. In these three contexts, participants in person-centered planning are working in the system, aiming to negotiate the best possible fit between people's ideas about the way they want to live and available service offerings and policies.

Context IV, **Customized Employment**, represents an integration of the Discovery process of person-centered planning into the development of employment that is so tight that the planning process is inseparable from the first stage of the delivery of assistance, assistance that will move on to negotiate a customized job role in a community setting. Where this service is developed and funded its practitioners are also working within the system. Given the importance of customized employment to assuring people with severe disabilities access to employment, this is an especially important offering to develop (Callahan & Condon, 2007).

In Context V, **Innovation Through Partnership**, people in the system consciously choose to work on the system, forming co-productive partnerships with people, family members and community members and their associations, surfacing conflicting values and devising

challenges to the assumptions and mindset that limit possibilities, and inventing new ways to support people in their own homes and valued community roles, especially inclusive education and employment.

Context VI, **Person and Family Generated Action-Learning**, is created by people and family members with their allies. It can exist outside the system, often with the support of skilled independent facilitators. Self-managed individual budgets and partnership with service providers and system managers committed to innovation multiply the resources available. Planning in this context can open new pathways to valued community roles. Skilled facilitation can create a deeper understanding of a person's identity and capacities, extend resourcefulness and initiate the creation of new forms of assistance.

Resources matter no matter what the context. To expect good results, there must be adequate investment in those who facilitate plans. Facilitators need well designed opportunities to learn whatever process they are expected to use and improve their practice by reflecting on their experience and they need adequate time and space to develop and maintain the sort of relationship with people and families that matches the task they are assigned. The richness and reach of plans depends on the resources those engaged in planning can steer. Levels of energy, good ideas about what is possible, connections and networks, skills, good character and good will in those who offer assistance make a difference, as does the accessibility of mainstream resources, the adequacy of public funds and the flexibility with which they can be configured, and the capacity of available services to offer personalized assistance. When resources are sufficient, person-centered planning can assist people to build strength of common purpose and guide and motivate learning by connecting with new people, trying new things and building on what works.

Change Strategy 1: Adopt New Rules and Procedures for Individual Planning

This is the strategy for system change that currently affects the largest number of people. The logic is straightforward: a new approach to planning specifies goals and objectives and mobilize resources that drive change by revealing what people want from the service system and instructing service providers to deliver it. There are at least four reasons that this strategy makes sense to managers and advocates who want change. First, practices associated with person-centered planning do improve people's experience of service when done capably. A map of a person's important relationships, a helpful format for discussion of what is important to a person and what is important for a person, a one page profile that serves as a summary introduction of the person to support workers, all carry face validity as components of a good individual plan and each draws attention to potential improvements in assistance. Second, person-centered planning enacts important values. The participation, voice and choice of people with disabilities and their families are central to most contemporary accounts of good practice. When an established approach to person-centered planning is ably performed, many people and families find the experience an accessible and engaging way to have their say about what they want from services. Understanding and responding to the whole person is valued. Capable person-centered planning allows the construction of accounts of the person that include expressions of the person's strengths, capacities, desires and preferences, relationships and cultural identity. An evidence base for practice is valued. There is modest evidence (Claes, et al., 2010, Holburn, et. al., 2004, Robertson, et al. 2006) that associates person-centered planning with increased number and variety of community activities, greater choice of activities, expanded social networks, increased contact with family and friends with disabilities, decreases in challenging behavior, and satisfaction with life and services –meaningful results even though

they do not include all of the results TASH values. Quality is valued. The prefix, “person-centered”, is sticky, signaling aspiration to quality in everything from nursing home regimens to self-managed individualized supports for a rich community life. Third, most people who experience well designed opportunities to learn about person-centered planning report enthusiasm for applying what they have learned and many identify specific positive changes in people’s lives that have resulted from their training (Amado & McBride, 2002; Dinora, 2011; Lunt & Hinz, 2011). Fourth, there is a powerful but seldom examined assumption that service behavior is controlled by individual plans. On this assumption, changing a plan issues new instructions that service providers convert into outcomes that embody quality as defined by the system’s mission or deficiencies whose remediation will improve quality.

These are good reasons to implement changes in how individual plans are constructed and whose voice is heard in the planning process. But from the perspective of the field as a whole it seems that changing the individual planning process isn’t sufficient to increase the number of people with disabilities who are supported in their own homes to live an engaged and contributing community life and gain at least part of their living from integrated employment. As it has worked out so far, the most common effects of this strategy disclose three challenges to realizing TASH’s values: many systems simply lack the capacity to support people in their own homes and jobs and existing offerings tend to overpower new possibilities; competing values limit the practice of person-centered planning; and person-centered planning tends to slide from a relational process to a transactional procedure.

Most instances of person-centered planning are powerfully influenced by the state of available local services, and most local service systems have not reached a tipping point that routinely offers personalized supports to valued social roles rather than assistance based on

grouping and pessimism about people's employability. A system with wide competence in customized employment will radiate a far different sense of possibility than one that is only familiar with less individualized and powerful approaches to employment support. A system that organizes its residential support to people with severe disabilities around group homes will typically develop person-centered plans that select and refine what's offered in group settings. There is nothing nefarious here, though there is a danger. Most people plan within the horizon they can see and most planning conversations are powerfully shaped by what their owners take for granted. Most people interpret visions of possibility in terms of their current reality: group homes will be celebrated as people's own homes; group based community experience programs and sheltered workshops will be unchallenged as the outer limit of meaningful occupation for all but the exceptional person. The danger is that person-centered planning will mask the work necessary to overcome system defined and controlled housing and unemployment behind the belief that people have chosen these conditions through person-centered plans.

Even reforms that employ person-centered planning to guide expenditure of individual budgets struggle to overcome the inertia of "stick with what's most commonly available". Substantial numbers of people and families choose to invest their individual budgets in whatever available local services they can afford; others pool individual budgets and set up group living arrangements or day programs; others individualize assistance but don't seek contributing community roles. This may happen because self-managing supports to a person's own home or integrated job is too difficult, or because the allocation of funds is too small or rules on expenditure discourage people, or because those involved are unaware of what is possible. Whatever the reasons, the highly desirable policy of granting people discretion to direct their

service funding is not a sufficient link between person-centered planning and the results that TASH values.

Person-centered planning can play a part in developing new opportunities for people to be at home and at work but it's practice is constrained by competing system values.

Accountability for establishing and maintaining the flow of funds for services often means that those charged with facilitating person-centered plans are also responsible for compliance with rules that, for example, set the timing of person-centered planning meetings and reviews and meeting requirements for documentation that can take considerable time and attention to system determined and audited detail. Those who facilitate may also be expected to enforce system or organizational policies that limit what can be offered or purchased ("The system can't pay for that.") or implement an organizational risk management plan ("We can't allow that."). Assuring that everyone in a system has equal access to a person-centered plan means that a proportion of planning meetings will happen with people who are not interested in change at the time their plan is due. Responsibility to make the most of scarce public funds often means that those responsible for facilitation have large and growing numbers of people to plan with and are charged to represent the system's strategies for rationing in the planning process ("The cost effective way to meet your need is a group setting."). Growing numbers multiplied by compliance with increasing detail complexity means less time to build relationships and less time to join people in learning from action that springs from planning. This can undermine job satisfaction for those who facilitate and lead to increased turn-over, which leads to a lack or loss of personal knowledge and makes building trust with people and their families more difficult. While the means systems use to serve the values of accountability, equity, and economy badly need redesign, these competing

values are legitimate and, maybe more important, sanctions for failure to comply shape not just the behavior but the consciousness of many person-centered planning facilitators.

Effective person-centered planning arises from people's free choice to work for change they care about. It is personal and relational. It generates knowledge that leads to positive action when people with developmental disabilities and their families trust those facilitating their plans with a glimpse of what really matters to them. This trust unlocks an energy that animates any effective person-centered planning process, a sense of identification with the person's human desires for an ordinary life: greater control of daily routine, friends, an intimate relationship, a real home of their own, a job and other roles that fit their interests and desires to develop and contribute. This trust personalizes and animates the planning process in ways that more detached discussions can not. It calls participants in planning to step into the gap between deep desire and current reality and act together to move toward what matters most. Absorption of person-centered planning into the routine, required, professionally distanced bureaucratic functions of selecting, specifying and monitoring services substitutes transaction and compliance for relationship and shared purpose.

Change Strategy 2: Use Person-Centered Planning In Service Reform

Person-centered planning has been assigned an important part in deinstitutionalization and in whole system reforms. The most careful studies of its effects report on its impact in these environments.

The Willowbrook Futures Project involved 40 people who remained in state institutions because the extent of their challenging behavior exceeded the willingness of service providers to provide the supports they required despite their membership in a class entitled by court order to community placement. The study (Holburn, et. al., 2004) divided the group in half

to contrast the effects of person-centered planning with traditional interdisciplinary team planning and assessed participants quality of life at eight month intervals for almost three years. Compared to those receiving traditional ISP's, person-centered planning participants were significantly more likely to move into a community living arrangement designed specifically for them; their teams were more strongly mobilized to identify opportunities and solve problems than the ISP Planning teams were; and measures of autonomy, choice making, daily activities, and satisfaction showed greater improvement.

A second, narrative account of the Willowbrook Futures Project from the perspective of those planning with one of its participants, Hal, identifies the commitment and innovative capacity it can take beyond capable plan facilitation to deliver on the values of a home of one's choice and the first steps toward integrated employment (Holburn & Vietze, 2002). Power shifted as Hal's parents were actively engaged in problem solving and decision making about where and with whom he would live and from whom he would receive assistance. Risks grew and subsided as safe ways to be individually present in community life were tested in action. An understanding of Hal's identity, interests and relationships provided a frame for applying technical expertise in behavior analysis to supporting activities and relationships that mattered to Hal. Innovations emerged: a community bridge builder, selected by Hal's parents, assisted him to try out a number of community roles in his new neighborhood before he moved from the institution; personalized funding for day services allowed him to escape a disability-group space and routine that did not suit him in favor of community activities that reflect his interests. This took persistence and sustained commitment to values-guided problem solving. Despite legal advocacy for the move, a high level of flexibility and cooperation from system authorities, additional funding to support innovation, and an unusually high level of competence in team

members and consultants there were delays (it took two years from the time Hal's father located a suitable house until the house satisfied all of the system's requirements and Hal could move in) and strong pulls away from more individualized, person-directed supports into the facility based services to groups that are typical of the system. Hal gained access to a community life because his allies chose to use their power and capacity to move from working in the deinstitutionalization process to working on the process to personalize supports for him, for example by asserting and defending family responsibility for the selection of house and staff and by deploying their expertise in behavior analysis in typical community settings.

In 2001, after wide consultation with people with intellectual and developmental disabilities, family members, service providers and professional experts, the English government adopted *Valuing People*, a policy that called for national transformational change in service delivery (Routledge, Sanderson, & Greig, 2002). The policy's goal is to assure that people exercise their rights, experience independence, have the power of choice in the services and supports they receive and are included as active participants in their communities. Overall, the change effort included new governance structures that provided people with disabilities and their families a key role in planning and decision making, carefully developed and authoritative guidance, a cadre of change agents and trainers, funds dedicated to the change, and research and evaluation. Person-centered planning is central to the transformation process.

The national initiative to implement person-centered planning included a longitudinal study that followed 93 people from four diverse areas that demonstrated a common approach to person-centered planning in a way that allowed an assessment of the impact of person-centered planning on their lives (Robertson, et al. 2006). Large scale training exposed a broad cross-section of people in each locality to the values and purposes of person-centered planning. Over

two years, expert external consultants supported local organizations to develop policies, procedures and practices necessary to implement person-centered planning and provided intensive training (85-100 hours) and support to local person-centered planning facilitators and local managers. Despite top down requirements, local commitment, and extensive investment in training, impact was meaningful but modest. Person-centered planning demonstrated positive impact on measures of contact with friends and family, choice, and an increase in the number, variety and extent of community activities. Staff perceived risk, identified health needs, and identified emotional and behavioral needs increased, likely as a result of greater attention to health and mental health needs and greater presence in community setting seen as potentially risky. Evidence of a significant impact on inclusive social relationships or paid employment was lacking. As the years have passed since the study's conclusion, the policy has been re-vitalized, person-centered planning remains an important element of the reform and people's use of personal budgets has grown dramatically, but delivery on TASH values remains modest: in 2010 about 15% of people in funded residential services lived in their own home and about 7% of adults with any degree of intellectual and developmental disability worked regularly in either paid or unpaid jobs (range across 152 local authorities is from 1% to 30% employed) (Emerson, et al. 2012).

Valuing People has created many positive changes, but the tipping point to people's widespread access to their own homes and jobs is yet to come. The reform aimed at a significant shift in power toward people with disabilities and their families. Such a shift poses a substantial adaptive challenge. Those in management face growing uncertainty about how to be accountable for prudent use of increasingly scarce funds, compliance with multiple agendas and standards set by central government, labor agreements and contractual relationships, and conflicting demands

from those who see the move away from congregate, staff controlled services as a serious threat and those who see it as a moral imperative. Those people and families who are expected to take up power and make and manage support plans that meld system assistance with mainstream services and natural supports face new roles and responsibilities, often while practical supports to these responsibilities are either lacking or in their early stages of development. A centralized, top down change effort has the advantage of some authority to drive the change, but its medium is technical change through rule, monitoring, guidance, expert technical assistance and training. Transformation can only happen to the extent that local people are willing and able to do the work of moving together through a adaptive challenges.

Change Strategy 3: Person-Centered Planning Guides Innovation

The first two change strategies assume that the capacity to support people in their own homes and jobs exists, either in the system as it is (Strategy 1) or as a best practice technology that can be assimilated as part of a reform (Strategy 2). In each case, the role of person-centered planning is to place an order that controls available resources to deliver what is agreed in the plan.

The third change strategy suspends this assumption and frames the task as generating innovations that grow in particular individual circumstances guided by what TASH values to detect possibilities, cross boundaries and mobilize diverse resources in order to open and sustain new opportunities for a person to be at home and at work. This process of person-by-person innovation differs in both process and content from routinely placing people in supported apartments where they sign a lease or placing a person on a pre-developed job. In this frame, people, families and service providers organize themselves as innovation generators (Meissner, 2012). Innovations grow through a process of social learning in partnership with people and their

families and allies and the community members who offer housing, jobs and other opportunities for engagement and contribution. Partnerships design, negotiate, acquire, update and improve the means to create and sustain people in contributing roles at work and at home as their life circumstances change. In this ecology of social innovation person-centered planning provides a forum to negotiate and renew the partnership and the highest purposes of the partners, hold the knowledge created as partners try new things, and support the continual design of next steps. Things almost never work out as anticipated and experience often modifies people's interests, so planning is a record of intentions and designs and a source of prototypes –good tries to be improved through learning in community settings– not a blueprint that guarantees attainment of preset individual goals. Outcomes are reasonably easy to measure on a population base: what proportion of people receiving public support are secure in their own homes with individualized supports; what proportion of people are earning in integrated jobs and what is the trend and distribution of their earnings.

People and their families and allies are capable of generating and self-managing the innovations necessary to pursue a good community life when they have sufficient capabilities: good connections to a diverse network of relationships, working links to local resources and associations, opportunities to develop knowledge and skills (including knowledge of what is possible for people with substantial disabilities), assets (greatly aided by control of a flexible individual budget of public money to pay for assistance and accommodation), and a sense of self-efficacy. Independent facilitation that supports planning, opening opportunities, and organizing assistance multiplies the number of people and families that can self-manage their assistance (Lord, Leavitt, & Dingwall, 2012) and so do family groups who support one another to plan, develop individual opportunities and learn together from their efforts (Mount & Lyle

O'Brien, 2002). Educational opportunities for people and families to deepen their understanding of and desire to experience what TASH values and learn about how others realize these values positively influences demand and advocacy.

In most places, systems currently invest most of their resources in operating and attempting to control the quality of group living arrangements and alternatives to integrated employment. There are significant sunk costs in buildings, approaches to services and enabling administrative policies and procedures that are inconsistent with TASH values though they retain the loyal and protective support of many people and families and service providers. As more service providers choose to make the journey toward redesigning their offerings from serving groups at the margin of community life to supporting people in their own homes and jobs as engaged and contributing citizens, more people and families will be able to form productive partnerships with them.

Reflections on one organization's journey identify some of the adaptive challenges that arise (Meissner, 2012; Mount and VanEck, 2011).

- What TASH values cannot be delivered to consumers. It must be co-created by active citizens working in partnership to make good use of system and community resources. There is a powerful assumption, embedded in the administration of system funds and the expectations of many families, that responsibility for a good life can be fully delegated to service providers. This expectation needs to be re-negotiated to recognize the need for partnership.
- There is a continuing tension between demands for stability (maintaining financial viability; compliance with system requirements; improving quality within the limits of existing, group based services; satisfying those who choose not to enter partnership) and demands for

innovation (investing time in building partnerships by operating from a place of generative awareness; deepening understanding of values; designing, learning from and redesigning multiple individualized forms of support; growing new methods of tracking and assuring quality; creating new roles and organizational structures to support innovation; dealing fairly with changes in staffs' conditions of employment; redirecting funds and negotiating money and regulatory room for innovations from funders and monitors; developing access to additional community and mainstream resources). The organization must find a form that allows it to be ambidextrous, dealing creatively with competing commitments and attending to both the necessities of stability and the desire for innovation.

- There are real losses; not everything can be win-win. Familiar routines, procedures expectations and assumptions change. Uncertainties grow and predictability declines, at least for the time of transition. Ways of exercising power that may have been taken for granted need to shift. To deal effectively with this, managers and growing numbers of staff need to develop their leadership act as instruments of change. This means developing the capacity for engaging self and others in sensing possibilities, mobilizing action, learning from action, and sustaining what works. The commitment to operate from a generative level of awareness animates both person-centered planning and the organization's strategic and tactical plans.

As more organizations choose to move into the gap between their current structures and what's necessary to move toward TASH values, stronger contexts for person-centered planning emerge.

Conclusion

In any context and under any change strategy described here, competent person-centered planning can make a positive contribution to what people with severe disabilities

experience. The depth of systemic and societal change necessary to create wide and reliable pathways to homes of people's choice and integrated jobs means that person-centered planning will only serve those valued outcomes when people are willing to create new strategies and structures as a context for their efforts to agree on a desirable future and coordinate efforts to move toward it. The work of articulating broad values, enshrining them in law and policy, and demonstrating their feasibility at a small scale is mostly done, though these victories remain vulnerable to regression. The adaptive work of creating new roles and relationships for people with disabilities remains a critical field for innovation.

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