

**Administration on Community Living (ACL) No Wrong Door System
Person-Centered Counseling (PCC) Training Program**

Course Title: Person-Centered Planning and Implementation

Lesson Number & Title: 10 Implementation and Follow-Up

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Narration:

Welcome to the lesson on Implementation and Follow-Up. This lesson is part of the course on Person-Centered Planning and Implementation in the Person-Centered Counseling Training Program. Please review the information on this screen and go to the next page when you are ready.

Text:

Welcome!

Here is a description of the lesson you are starting:

Specific actions of a person-centered plan may be completed by anyone the person chooses and who is willing. Completing actions may or may not be a part of the Person-Centered Counseling (PCC) professional's role. However, sometimes they have role in implementing actions in the plan. At a minimum, the PCC professional's role will include follow-up regarding plans as desired by individuals. In addition, the PCC professional may have a role in identifying gaps in services and supports. These may be in the community or their agency's capacity to support people in a person-centered way. This lesson will help you understand when these duties may be a part of your role and how to accomplish them.

Learning Objective:

After completing this lesson:

You will be able to complete designated aspects of implementation and follow-up in person-centered planning.

To view course information, including On-the-Job Training Assessments, Portfolio Assignments, and a list of Activities, click on the “Menu” tab and then click Lesson Information.

This course is one of the six foundational courses in the No Wrong Door System Person-Centered Counseling (PCC) Training Program meant to provide basic skill and knowledge related to the identified competencies for a PCC professional. Click on the box below to learn about how person-centered thinking approaches are infused throughout these courses.

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Narration:

Person-centered thinking includes the promise to listen and keep listening. It also includes a promise to act on what we hear. Follow-up is often an essential part of the Person-Centered Counseling professional's role even in the absence of a formal plan. You may also have roles in implementing aspects of both formal and informal plans. When you play a role in implementation and follow-up, you are helping to keep the promises of person-centered thinking. Please review the information on the page. When you are ready, go to the next page.

Text:

Implementation and Follow-up

People seeking services often experience systems as disjointed. The professionals they contact are often unaware of the whole experience of navigating services and supports. This can be confusing, overwhelming, and disheartening. Person-Centered Counseling (PCC) professionals can help ease this process. By supporting the development of a good person-centered plan or using person-centered discovery, they help clarify what is meaningful for individuals. This will make person-centered outcomes more likely. It also helps organizations and communities identify what might be missing to make this a reality. The PCC professional's role in implementation and follow-up can be very meaningful.

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Narration:

Following up means making contact with the person after action steps have been put into place. It achieves many purposes. Sometimes people will have difficulty completing action steps because of limited energy, motivation, or ability. They may have agreed to things in the moment that no longer have meaning. Or they may have changed their mind. People may follow action steps only to find it did not help them achieve their goals. Follow-up helps identify these issues early on. It can prevent the person from stalling out when barriers appear. Additional discovery may be needed. Or more support may be needed. All of this is very helpful information that can be used to revise a plan or action steps. Review the information on this page. When you are ready, go to the next page.

Text:

Review for Common Missteps During Follow-Up

Despite best efforts, planning can be challenging. You will learn to do better each time. However, no plan is ever perfect. Follow-up allows for these common missteps and other barriers to be discovered before momentum is lost. If plans are stalled out, you will want to review the situation with common missteps in mind. In another lesson, you learned about common missteps in plans. You review them when you make a plan. However, they can be useful when you are trying to understand why action is not being taken on a plan.

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Narration:

As you wrap up a plan, it's important to define when, how, and how often there will be follow-up. A person may decline follow-up, and that is fine. Even if a person declines to have you follow-up with them, make sure they know you are available if they want additional support in the future. Always provide people with a way to contact you directly. Review the information on this page. When you are ready, go to the next page.

Text:

Specifics of Follow-up Contact

The point of follow-up is to make sure people are supported and to help problem-solve when barriers occur. To complete follow-up, you will want to consider the following:

1. When would be a good time? It needs to be after the components of a plan can be started. But not so far off that people will have lost momentum if they have gotten off track. For longer term, more complex plans, a series of check-in points should be planned.
2. How is follow-up best done? For many people, a phone call will be helpful and work. However, for others, it may be best to follow up in person. Find out the person's preferred way of communicating.

Make sure follow-up gets embedded into the action plan. It's important to be persistent in trying to reach the person to follow up. Many things can come up. Try your best to be a resource and support to the person. You can't

assume a situation got better or the person doesn't need any more assistance. It may be that things have gotten worse. Also, remember that you may have some documentation requirements related to your follow-up efforts. You should know your agency's guidelines regarding follow-up and documentation.

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Narration:

Follow-up should never feel like an interrogation or an investigation. People should not feel that they have disappointed you. This is their plan. You are a support to them. It's not your purpose to ensure they are completing the plan. It is your purpose to ensure that things are going well and to offer more help if needed. Please review the information on the page. When you are ready, go to the next page.

Text:

Learning From Effort and Moving Forward

When checking in, you may find that things have gone well and the plan worked as hoped. It may be that at this new stage, a new plan for a different purpose may be helpful. Or it may be that your role with the person should come to an end. Other times there may be problems and barriers you can help solve. Use your person-centered thinking skills and approaches as needed.

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Narration:

There will be times that no action on the plan has occurred when you check in. If the plan is truly based on what's important *to* the person and support is well aligned with the person's needs and goals, there should be some progress. While people supported are under no obligation to follow these plans, lack of progress is a sign that something likely went wrong. This could be with the planning process itself or it could be something has changed since planning. Review the information on the page. When you are ready, go to the next page.

Text:

Follow-up When Action Steps Aren't Taken

The purpose in developing the plan is to support greater choice, direction, and control in person-centered goals. This is especially important for people at risk of losing their voice in the system. If there is no progress, it will be helpful for you to understand why. This may be a time for you to help the person or their team regroup and clarify. While you want to get answers that can help, this is a discovery process and not an interrogation.

Activity: Figuring Out Why a Plan Isn't Working

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Narration:

Sometimes the person is not able to follow through on many or any items for themselves due to their condition. Follow-up can be even more important then. Review the information on this page. When you are ready, go to the next page.

Text:

Follow-up for People Who Need Significant Help

Person-Centered Counseling (PCC) professionals will work with natural and professional supporters to help arrange person-centered supports for people who need them. Sometimes the people may not be able to advocate for themselves easily. Sometimes their families may not be able to be as engaged as they would like or at all. Building in a planned follow-up can help to ensure things stay on track.

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Narration:

Another challenge is when there are multiple goals and steps to keep track of. Particularly in transition periods or with people who have significant needs. When people are unable to access very many paid or natural supports, there can be a variety of things to keep track of. Sometimes there are not only multiple action steps per goal, but more than one goal. In these situations, the Person-Centered Counseling professional will likely have frequent contact and a higher level of responsibility for implementation. However, some of the person-centered thinking approaches can still help support the success of the plan. Please review the information on the page. When you are ready, go to the next page.

Text:

Support for Tracking Multiple Goals and Action Steps

You have met Carla in some previous lessons. **Click here** to see her full plan with her person-centered SMART goals and action plan. Carla has a lot of goals and some significant challenges. She also has few natural or paid supports to rely on. As a result, Neil, her Person-Centered Counseling (PCC) professional makes a regular, every-other-week meeting with her as she sorts through housing and employment issues. They have had two successful check-ins. However when they talk this week, Carla is very frustrated that they haven't found good housing yet. She is angry about an interaction that frightened her at the last place. "You are expecting too much of me. I can't keep track of everything. You need to come with me to these

visits too!” she demands.

Neil is not able to open that much time in his schedule on a regular basis. He works with Carla to prioritize her goals. He also helps her identify who might be available to help her. She considers her sister and her cousin Willie. She decides to ask Willie because he has a car. Neil also tells her about the learning log tool. He asks her if she is willing to track some of the details on there. This will give them concrete information to work with regarding what’s working or not on her plan. To see a section of her learning log, **click here**. What do you see that was helpful and might shape the plan in the future?

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Narration:

A gap analysis is identifying the difference between an ideal and what exists today. As a Person-Centered Counseling professional, you will support filling those gaps with people in ways that make sense to them. This is done through person-centered planning. However, you may also be asked to track data or participate in activities that are meant to identify other gaps. These may include gaps between what is identified as important to people and what is available in the support system or community. Review the information on this page. When you are ready, go to the next page.

Text:

Support for System Change

There are barriers to people being included and supported in their communities. Even with help from committed professionals, there may be gaps between what people want and what communities provide. Tracking and reporting information may be a part of your job as a Person-Centered Counseling (PCC) professional. So can gathering information specifically related to the satisfaction of people connecting with No Wrong Door (NWD) services. This can support evidence regarding what needs to change. PCC professionals may participate in the following types of gap analysis or information tracking and reporting:

- <bullet> Gaps in the particular needs related to plans for individuals. Ongoing creativity, problem-solving, and decision support will be needed. This is part of keeping the promises of person-centered thinking.

<bullet> Services gaps within the local NWD hub. Consider: What's missing? What can be improved? How can we work smarter? Who else do we need to collaborate with?

<bullet> Gaps in the community regarding accessibility and affordability of community services, events, and common areas. Think about public transportation and information accessibility: Are people fully welcomed and supported by the community and in public places?

<bullet> Services eligibility gaps or barriers. Think about rules, regulations, laws, and program eligibility: What needs to change to make this better and more person-centered?

Talk to your supervisor or managers about what your role will be in system and organizational change related to person-centered practices.

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Narration:

Congratulations! You have now finished the lesson. Let's take a few moments to review the key ideas and learning objectives.

Following up is an important part of many No Wrong Door interactions. It is a part of ensuring people benefit from the support and services offered. If people or teams are not taking action on a person-centered plan, it is likely because the plan was not truly person-centered or something has changed since the plan was made. Person-Centered Counseling professionals should use discovery and other person-centered skills to check in with the person and supporters.

Please review the information on this page. You can also review the content as needed by using the "Left Arrow" icon at the bottom of the screen. This will take you back through the lesson. You may take the test now, later, or as requested by your employer. Good luck and thanks for completing the lesson!

Text:

Conclusion and Lesson Review

<bullet> Follow-up is making contact after the plan and action steps have been put into place.

<bullet> Follow-up is a way of ensuring that the plan is person-centered and

useful and that there is enough support arranged.

<bullet> Get permission to follow up. However, be persistent. People can have many barriers to success, and follow-up can really help.

<bullet> A learning log might help in a situation where someone had multiple goals and action steps to keep track of. Regularly scheduled check-ins can help as well.

<bullet> You may be asked to track and share information that supports system, community or organizational changes. Check with your employer.

Reflection on Learning Objectives

Directions: Review the objective(s) on this page. When you are done click on the “My Notes” icon at the top of the screen to use the electronic journal or use your own notebook. Write down your answers to the following questions.

1. What did you learn in this lesson that you felt was important?
2. What will you do differently because of the content in this lesson?

Learning Objectives

After completing this lesson, you will be able to complete designated aspects of implementation and follow-up in person-centered planning.

If you are ready to take the test, click on the “Take Test” tab. You can also take the test later: It will be available from your “Personal Page.” To access it, click on the “My eLearning Lessons View” button. Choose the lesson title from the list of assignments, and then click on the “Start the Lesson” button at the bottom of the screen. Click the “Take Test” tab to start the test.

We recommend that you complete the On-the-Job Training Assessments and Portfolio Assignments for this lesson. They will help you demonstrate competencies for the ideas presented. To view On-the-Job Training Assessments, Portfolio Assignments, and a list of Activities, click on the “Menu” tab and then click “Lesson Information.”

Again, congratulations and good luck!