

**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: 3 Using Person-Centered Thinking Approaches to
Support Discovery and Build the Plan**

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**Lesson Number & Title: 3 Using Person-Centered Thinking
Approaches to Support Discovery and Build the Plan**

Page No: 1

Narration:

Welcome to the lesson on Using Person-Centered Thinking Approaches to Support Discovery and Build the Plan. 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:
Gathering and organizing useful information is a crucial task when helping to develop person-centered plans (PCPs). This discovery process uses purposeful but branching conversations as a core strategy. The skills and approaches from the person-centered thinking course are used to help identify a person's goals and build the components of the plan. This lesson will review these skills and approaches and the basics of how they relate to formal, written PCPs in the No Wrong Door (NWD) system.

Learning Objective

After completing this lesson:

You will be able to use purposeful, branching conversations and other person-centered thinking skills as part of discovery to guide the development of a person-centered plan.

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:

To develop a formal person-centered plan, you will use skills in person-centered thinking and discovery. You will organize your approach in ways that work well for each individual. Your goal is to be able to create a strength-based description of the person. It should identify the person's goals and how best to help the person achieve them. You will need to be flexible and use approaches and skills that make sense for the person. However, purposeful branching conversations will be a foundation. Please review the information on this page. When you are ready, go to the next page.

Text:

Discovery for the Purpose of Planning

You may not know right away if a person is going to want to complete a formal person-centered plan (PCP). You may need to support them in meeting high-priority needs right away. However, person-centered discovery starts with your first interaction. It is a part of every interaction you have, even after a plan is developed. Keep in mind, the things you need to know in order to build the basic components of a plan are the very things that any person-centered discovery process should elicit, regardless of the need for a formal plan.

It's critical to have a specific purpose in mind when you engage in discovery. It can be easy to get distracted in discovery. You can become focused on system needs or the needs of others if you are not careful. You must start with the person and purpose in front of you at the moment. This may or may not be a person you develop a plan for. However you should always try to understand what the correct "to/for balance" is for the person you are engaging at the moment.

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Narration:

Discovery for a formal plan is likely to take more than one visit or conversation with the person. It may also take place in a variety of settings. These could include your office, over the phone, or in the person's home. Discovery could happen in crisis settings, hospitals, schools, or even shelters or jails. This will depend on who uses your services and what their needs are. You may help connect them to another person or organization along the way. Please review the information on the page. When you are ready, go to the next page.

Text:

Keeping the Promises of Person-Centered Thinking

It's important to keep the three promises of person-centered thinking (PCT) whenever you engage people coming to the No Wrong Door (NWD) system. As a reminder these are:

- <bullet> A promise to listen, listen for meaning, and keep listening.
- <bullet> A promise to act on what is said in a timely and person-centered way. A promise to keep working with people to achieve their goals.
- <bullet> A promise to be honest, upfront, and transparent. A promise to keep people informed about progress, what you can and cannot do, and when you are unsure how to help them yet.

It's also important to commit to working in partnership with everyone who must be involved. Be respectful and appreciative of others. Agree to be unconditionally constructive in your interactions around discovery, planning, and problem solving.

It is the person's decision whether they want a formal person-centered plan to help meet their goals.

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Narration:

A foundational skill and approach to being person-centered is the discovery conversation. A discovery conversation is a branching conversation, meant to elicit what's important *to* a person, what's important *for* them, and the way they want to balance these aspects of their life. Discovery will also help you identify goals and best support. Please review the information on this page. When you are ready, go to the next page.

Text:

The Discovery Conversation

Purposeful branching conversations are foundational to discovery. Branching conversations use open-ended questions and active listening. They share the “spirit of motivational interviewing, which you may already be familiar with at this point. As a Person-Centered Counseling (PCC) professional, you will guide branching conversations. They should lead to identification of the person’s “to/for balance,” which informs the goals of the plan.

As a PCC professional, you will use the discovery, every day learning, and management approaches taught in the Person-Centered Thinking and Practices course to help explore and organize information as needed. The information you gather in discovery will be used to complete the plan. Remember: You will never include anything in the plan that isn't approved

by the person. (If you're not sure, try using the guess/ask/write tool). It should also be clear that developing a plan takes time and that the plan is unlikely to be completed after just one meeting with the person.

The discovery conversation may include others who provide support or are important to the person. As a PCC professional, it's important to be able to work with a variety of people and to allow a pace that works well for everyone involved. Not everyone has experience or comfort with the types of decisions that need to be made. It's important to encourage questions and be patient with each person's need to process. You must respect the value of silences and pauses.

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Narration:

In the course of person-centered thinking and practices and your in-person training, you received information on many approaches that can be useful in discovery. We will briefly review them here, and then you will learn more about how they are used in practice through examples in other lessons. Please review the information on the page. When you are ready, go to the next page.

Text:

Discovery Approaches and Tools

All of these tools and approaches should be used flexibly. As a Person-Centered Counseling professional, you will use them in ways that make sense for each situation and each individual.

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Narration:

In your previous work, you also received information and training on approaches that can help deepen understanding and work with others. These include approaches that help you to dig deeper into areas of understanding, to solve problems, and to negotiate. We'll briefly review these everyday learning approaches here, and then you'll learn more about how they are used in practice through examples in other lessons. Please review the information on the page. When you are ready, go to the next page.

Text:

Everyday Learning Approaches and Tools

These tools and approaches should be used flexibly. As a Person-Centered Counseling professional, you will use them in ways that make sense for each situation and individual.

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Narration:

Tools and approaches for managing roles and expectations were also shared in previous courses and training. They help with organizing information from discovery and providing clarity around expectations. We'll briefly review these approaches here, and then you'll learn more about how they are used in practice through examples in other lessons. Please review the information on the page. When you are ready, go to the next page.

Text:

Approaches and Tools for Managing Information and Expectations

These tools and approaches should be used flexibly. As a Person-Centered Counseling professional, you will use them in ways that make sense for each situation and individual.

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Narration:

All of the tools, approaches, and skills we've reviewed will be used flexibly in discovery and building the plan. You want to try to find the mix that will maximize your opportunity to gain information and work well with the individual and others. You will see some examples of this in other lessons of the course. You will also learn how to transfer the information you learn into a formal person-centered plan. Please review the information on the page. When you are ready, go to the next page.

Text:

Flexible Use of Approaches

Activity: Choosing Your Tools and Approaches

Knowing which tools and approaches to use for planning is a skill the Person-Centered Counseling (PCC) professional develops over time. It takes practice to develop these skills. For now, use this short activity to review some of the choices PCC professionals can make.

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Narration:

Keep in mind that if person-centered discovery is always part of your approach, you will naturally begin to gain much of the information needed for a good plan right away. This positive, strengths-based information will help you identify people's goals. You will know what is important *to* them and *for* them and how they want to balance these. This will help you more quickly support the development of a formal person-centered plan if asked. Please review the information on the page. When you are ready, go to the next page.

Text:

Bringing It Altogether in a Plan

In the next few lessons you will learn more about specifically how discovery from conversations and interactions is organized into a plan. Discovery results will be organized for a purpose. They will be transferred with support and guidance from the person into a one-page description. This will help professionals and other supporters quickly know the most important things about the person in regards to their goals and working with them.

The goals will be written from the person's view and supported by specific, measurable, assigned, relevant, and time bound action steps that you help develop. Other tools such as matching profiles and communication charts may be included as needed to help people carrying out the plan. When more

is learned through exploration, problem solving, or negotiating, the plan can be updated. This plan will belong to the person. They will use it in ways that they prefer to experience more continuity in services and supports, more opportunity, and maximum choice, direction, and control in services. As a Person-Centered Counseling professional, you may engage in researching options. You may support the person in evaluating options, including the financial ramifications of choices as part of pulling together the plan.

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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. Person-centered thinking approaches and tools can be used to enhance your skills. They can help you hone in on the information needed to create a strong person-centered plan. It's important to keep in mind that discovery should start with a purpose. It will help you decide which approaches will work best to help identify the critical components of the plan.

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> Not every person who contacts the No Wrong Door (NWD) system will be interested in a formal plan immediately. However, using basic person-centered discovery skills in every interaction will support formal planning in the future.

<bullet> Once a person decides they want a plan, the tools and approaches

may be used more formally. Other people the person identifies may be part of discovery and planning.

<bullet> In the NWD system, a plan is unlikely to be completed after just one interaction. Planning should be paced and organized in a way that makes sense for the situation and the person.

<bullet> Every person-centered thinking tool and approach will work well in a variety of situations. They should be used flexibly in discovery and planning. It can take practice and skill to understand which tool or approach might be best in a given situation.

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 use purposeful, branching conversations and other person-centered thinking skills as part of discovery to guide the development of a person-centered plan.

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!

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