



**Office for People With
Developmental Disabilities**

Workforce and Talent Management
Training Curriculum Series



How to Facilitate an ISP Meeting

Participant's Manual

Education and Training Online Resource Library



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Symbol Legend:



= Activity



Introduction

Course Outline:

- **The ISP Meeting**
 - Purpose
 - General Types
 - Frequency

- **The Role of the Service Coordinator**
 - Three primary roles of the service coordinator
 - Role of the service coordinator as facilitator
 - Qualities and characteristics of the facilitator

- **Preparing for the Meeting**
 - Focus of the meeting
 - Scheduling
 - Participants
 - Invitations
 - Pre-meetings
 - Preparation by the service coordinator
 - Agendas: the meeting structure
 - Format: the meeting process
 - Tools

- **Facilitating the ISP Meeting**
 - Setting up
 - Recording the meeting
 - Welcome and getting started
 - The ISP Review meeting
 - Step 1: Review/gather information
 - Step 2: Review/identify themes
 - Step 3: Review/choose personal valued outcomes
 - Step 4: Review/identify safeguards
 - Step 5: Review/develop next-step strategies and a personal network of assistance
 - Ending the meeting



- **After the meeting**
 - Follow-up
 - Documentation
 - Distribution of the ISP

The Purpose of the ISP:

The ISP is a personal plan for helping people with disabilities. The ISP meeting is a time to develop and/or review this plan. It is the responsibility of the Medicaid Service Coordinator to facilitate ISP meetings. The purpose of this training is to give information and enhance skills that will help service coordinators in this very important role.

The material in the participant manual offers best practices, tools, and techniques for planning and holding effective ISP meetings. It is intended as training material that can be used as a resource and guide in actual practice.

The focus of the material and training format is the development and review of ISPs from a person-centered perspective. This type of planning seeks to listen, discover, and understand the person with disabilities.

ISPs developed and reviewed from this approach are not unnecessarily compromised by agency or bureaucratic needs.

This course was designed specifically for the training of service coordinators. People with disabilities, their families or advocates, and service providers will also find this information helpful in reviewing ISPs or other plans, such as HCBS waiver habilitation plans.

What does the word “facilitate” mean?



Course Expectations:

- Review OPWDDs expectations for ISP meetings
- Learn how to plan and facilitate an ISP meeting
- Enhance skill development in meeting facilitation

Keep this participant manual handy!
You will find it helpful.



SECTION 1: The ISP Meeting

In this section we will be focusing on:

- The purpose of an ISP Meeting
- General types of ISP Meetings
- Frequency of ISP Meetings

The Purpose of an ISP Meeting:

- An ISP meeting is a planning meeting. It is part of understanding how someone wants to live and helping the person move toward the life they want and desire.
- Planning is an organized way to learn about the person and moving forward with what you have learned, including any areas of health and safety.
- Planning is creative. Learning about the person and applying what you learned to help them move forward.
- The purpose of an ISP meeting is to end up with a new or updated plan for helping the person with disabilities.

General Types of ISP Meetings:

Since the purpose of the ISP meeting is to plan, they are usually convened to:

- Develop a plan for receiving supports and services (especially if the focus person of the meeting is new to Medicaid Service Coordination or the HCBS Waiver).
- Review the entire plan on a regular basis to keep it meaningful and effective.



Frequency of an ISP Meeting:

How often are ISP Meetings held?



SECTION 2: The Role of the Service Coordinator

In this section we will be focusing on:

- Three primary roles of the service coordinator
- Role of the service coordinator as facilitator
- Qualities and characteristics of the facilitator

Three Primary Roles of the Service Coordinator

The service coordinator has three primary roles as an ISP meeting member:

Meeting Facilitator:

- As a meeting facilitator, the service coordinator seeks to guide or ease a group of people through a process of face-to-face planning whether the meeting is a review of an existing plan or the development of a new one.
- Facilitation includes helping the group to experience as few obstacles and difficulties as possible.
- Facilitation includes helping to guide the group dynamics and flow.
- Facilitation includes taking charge.

Professional service provider and contributor:

The service coordinator:

- Shares new information
- Participates in discussions
- Helps the person in making decisions, when necessary.

Advocate for the person:

- The service coordinator champions his/her cause and often speaks for the person when he/she is unable to speak for himself.
- The service coordinator is not the “advocate” but advocates on the person’s behalf.



The Role of the Service Coordinator as Facilitator

The role of the facilitator at an ISP meeting is to guide and escort the group towards the accomplishment of its stated purpose. This can include:

- To begin or continue planning
- To review the ISP
- To focus on certain areas that need special attention.

The facilitator uses both skills and techniques to help move the group through an agenda. The facilitator keeps everyone focused on reaching the end results. Facilitators help the ISP meeting make sense for the person.

Service coordinators, as ISP meeting facilitators, will often be:

An Educator: Teaching the roles other group members play or the various methods used to resolve problems.

A Protector: The protector of ideas or a protector of people from attacks by others.

A positive force: Setting the right (positive) tone and leaving negativity behind.

An observer: Observing how the group is working together (i.e. if it isn't working, may need to take something out of your bag of "tools" to make the process work better).

A supervisor:

- Supervising the meeting process
- Making sure that the group doesn't lose its' focus (keep the meeting focused).
- Making sure that all ideas and needs are identified and included in the planning process.

Facilitation involves all of these roles. Balancing them is a challenge.

It is not the role of a facilitator to own the group process or own the group's success or failure.



Qualities and Characteristics of the Facilitator

- Much of the "skill" in facilitating comes from the facilitator's knowledge, approach, personality, experience, beliefs, values, attitudes, skills, habits, and personal expectations.
- Good facilitators are always learning and looking to improve certain qualities and characteristics within themselves.



Activity One: Qualities, Characteristics and Motivators

1. List three personal characteristics that will help you facilitate a good ISP meeting:

2. List three things that positively motivate you about facilitation ISP meetings (i.e. what has value for you in running a good ISP meeting?):



SECTION 3: Preparing for the Meeting

In this section we will be focusing on:

- Focus of the meeting
- Scheduling
- Participants
- Invitations
- Pre-meetings
- Preparation by the service coordinator
- Agendas: the meeting structure
- Format: the meeting process
- Tools

Focus of the Meeting

The ISP meeting centers on 5 major areas:

- Reviewing and gathering information, including significant updates or new discoveries
- Reviewing or identifying themes
- Reviewing or identifying personal valued outcomes
- Reviewing or identifying safeguards
- Reviewing and developing next-step strategies and resources

In addition, an ISP meeting is an opportunity to focus on areas of the person's life that need special attention. The meeting focus adds to the direction and purpose of the meeting. The service coordinator, in partnership with the person and his/her family or advocate, should determine what the group wants to focus on prior to the meeting.

Scheduling

This section gives some suggestions for scheduling ISP meetings. ISP meetings should be scheduled with consideration to a number of factors:



- The meeting date and time should be set so the person, family, and other key members can attend.
- The meeting place should be accessible and comfortable for the focus person and his or her family so people feel free to speak. Consider any special accommodations that may be needed.
- Timeframes for the meeting should not unnecessarily compromise the intent or focus of the meeting.
- Meeting schedules should be set far enough in advance to give members ample time to make necessary plans and to prepare for the meeting.

From your experiences, how long are typical meetings?

Participants

- Collaborative planning is important.
- Meeting members must be committed to act on what was learned and fully participate in the planning process.

The size of the group should be comfortable for the focus person.

- At times the service coordinator may need to keep the number of participants to a minimal level.
- In this situation, input from outside the planning meeting could be sought; a series of meetings could be scheduled; or small group pre-meetings may be held.



OPWDD Policy:

- OPWDD policy requires that, at a minimum, the ISP meeting include:
 - The focus person
 - Advocate (which may be a family member)
 - Service coordinator
 - A representative from: (depending on the service received)
 - Waiver Service providers (e.g. Residential habilitation, Day habilitation, Pre-vocational services, Supported employment, Consolidated Supports and Services).

- In addition, the ISP meeting may include:
 - Whoever the person wants to be there
 - Workshop
 - Clinical services (nurse, psychologist, social worker, speech therapist, physical therapist, nutritionist, recreational therapist, occupational therapist, psychiatrist)
 - Friends
 - Employers or co-workers, or people from other work experiences and volunteer
 - School counselors, staff or volunteer
 - Teachers
 - Church/synagogue members
 - Neighbors
 - People who have community connection
 - Family Care Provider and Family Care Liaison (if in Family Care)
 - CAB (for Willowbrook Class Members)

Invitations

- Invitations are a tool that gives the invited member certain information regarding the meeting.



- Although not required, it is often helpful.
- Invitations can be written (letter, email), verbal (in-person, by phone).

Examples of what may be on a meeting invitation:

- Who's meeting it is (name of the focus person)
 - Note: When using email make sure private information is safeguarded and HIPAA is followed.
- Date
- Time and timeframes (for example, 2:00 to 4:00 PM)
- Location
- Purpose and focus (for example, to begin or continue planning; to review the ISP; and/or to focus on a certain area such as planning for a new job or plans to give the parents periodic relief and assistance).
- Preparation needed by the group member or items that should be brought to the meeting (for example, knowledge of the person's progress towards pursuing outcomes; new experiences or significant changes in the person's life; the current habilitation or day treatment plan; the child's Individualized Education Plan (IEP) or an updated assessment)
- Ask members to check in a day or two before the meeting with any current issues that may interfere with the planning process.
- RSVP if desired or needed

Pre-Meetings

- Meeting with the focus person prior to the ISP meeting is an important element to having a meaningful and effective meeting.
 - This gives you the opportunity to get to know the person better and his/her issues and it gives the person a chance to prepare for the meeting.
 - This is a great way to have a face-to-face meeting with the person.
 - Sometimes pre-meetings are held with people who know the person the best when the child or adult is has difficulty putting thoughts into words.



What do you see as the importance of pre-meetings?

Examples of questions that can help the person and/or family prepare for the meeting

- What are my dreams in life?
- What are some things I would like to do?
- Am I getting the kind of help I want?
- Am I satisfied with the help I am getting?
- Is there anything stopping me from getting what I want and need?
- Is there anything that needs to change in my plan?
- Is there anything new about myself or my choices that I want to tell other people about?
- Is there anything I want to take off my plan?
- What would I like to do better?

Preparation by the Service Coordinator

- In addition to helping the person get ready for the ISP meeting, the service coordinator needs to review and prepare as well.
- As a professional service, the service coordinator not only facilitates the meeting but also contributes to discussions, helps to make decisions, and advocates for the person.
- Balancing these roles is a complex task and the service coordinator should be prepared for the contribution he/she will make by:
 - Requesting new or updated clinical evaluations as needed. (social work, psychosocial, nursing, physical, psychological, speech, hearing, occupational therapy, physical therapy, psychiatric, neurological, recreational, educational, and other types of assessments and evaluations)



- Reviewing the ISP for possible changes (but do not write an updated or new ISP until after the meeting)
- Reviewing the service coordinator's notes for significant changes or discoveries during the time period since the last meeting.
- Searching for new information that will impact discussions and decisions at the meeting according to the meetings' purpose, focus, and agenda.
- Preparing or reviewing a list of questions that can be asked at the meeting.
- Determining the meeting ground rules.
- Deciding if a co-facilitator would be helpful and locate an assistant for the meeting. This person could act as the recorder by writing information learned and decisions made on the easel paper or could actually facilitate the discussions at times to allow the service coordinator to focus on his/her contributions.
- Choosing a meeting format. This is the process for how information will be gathered, discussed, and reviewed and how decisions will be made.
- Making arrangements for any special accommodations, such as interpreters.
- Deciding if a timekeeper is needed.

Agendas: The Meeting Structure

- Agendas give a structure and focus to the meeting.
- An "anything goes" approach to meetings rarely works.
- Agendas can be developed with the person and family prior to the meeting and distributed at the time of the meeting.
- Agendas help the person maintain control of his/her meeting and avoid routine, meaningless meetings.
- They also help the service coordinator to balance the agenda of others at the meeting, for example residential and day habilitation service providers.
- Agendas can include such things as:
 - Welcome and introductions
 - Purpose and focus of the meeting (for example, to review John's ISP and plan for his move to his new home)
 - Review/gather information
 - New or changed information from John and/or his advocate.
 - Significant updates or new discoveries from other group members



OPWDD: Putting People First

- Review the themes in John's life
- Review John's personal valued outcomes and progress being made
- Review John's safeguards
- Review and develop next-step strategies and resources, especially for the move to his new home
- Breaks
- Timeframes (for example, 2:00 - 4:00)

Agenda for ISP Review Meeting
(SAMPLE)

Individual's Name:

Date of Meeting:

Welcome and Introductions:

Purpose/focus of the meeting (i.e. to review ISP):

Review Agenda and timeframes with group:

Review new information, significant updates, new discoveries and any changed information since the last meeting (from the individual, their advocate and the waiver hab staff):

Review new medical concerns or issues:

Review the valued outcomes, agree on new ones or changes to existing outcomes. Decide who will address what:

Review the specific res hab, day hab, etc. plans and future directions of plans:

Review safeguards:

Review listed services in the ISP to ensure accuracy:



Other or added agenda items:

Thank all for participating

Review timelines of when revised plans will be received by MSC and when the ISP will be distributed:

Possibly plan date of next review of the ISP:

End Meeting

What kind of things would you add to an agenda?

Format: The Meeting Process

- Format refers to the way in which the facilitator plans to "move through" the meeting.
- It's the process for how information will be gathered and reviewed, discussed, documented, and how decisions will be made.
- A format uses tools and techniques to also increase participation from group members.
- Without a format the meeting can seem disorganized, unruly, and important information will be lost in the shuffle.
- A format should be chosen prior to the meeting.

Examples of possible formats:

- "Maps" (easel paper) from the previous meeting are taped to the wall and reviewed. Blank paper is added for new information or new categories.



OPWDD: Putting People First

- Agenda topics are listed on easel paper and discussion points or decisions are written under each topic.
- The 5 steps to planning are used as topic areas and headers for easel paper.
- The ISP (with attachments) is read by members of the group followed by discussions and decisions in various topic areas. The resulting information is written in categories on easel paper.
- A "go-around" to learn new information is used to brainstorm ideas and resources.
- Decisions are made by reaching consensus
 - Certain problem solving techniques are used for getting "unstuck".

Tools

Tools are items needed for a successful meeting. They range from markers and easel paper to coffee and donuts.

Examples:

- Copies of the last ISP with attachments
- Attendance sheet
- Copies of the agenda
- Easel and easel paper to document the meeting
- "Maps" or easel paper completed at the last meeting (tape on the walls prior to the meeting)
- Masking tape (for adhering easel paper to the walls)
- Markers
- Availability of paper and pens
- Coffee/juice/water and a snack
- Necessary reports or other types of written information
- Comfortable chairs in an arrangement that encourage participation by all.



SECTION 4: Facilitating the ISP Meeting

In this section we will be focusing on:

- Setting up
- Recording the meeting
- Welcome and getting started
- The ISP review meeting
 - Step 1: Review/gather information
 - Step 2: Review/identify themes
 - Step 3: Review/choose personal valued outcomes
 - Step 4: Review/identify safeguards
 - Step 5: Review/develop next-step strategies and a personal network of assistance
- Ending the meeting

Setting Up for Meetings

- Arranging the room for meetings helps to set the tone.
- Prior to the arrival of group members, the facilitator sets up the room with many of the items listed in the "tools" section. This includes taping the "maps" from the last meeting and new paper for changes or new information.
 - Information gathered and decisions made are documented on the easel paper or "maps" by the recorder so that everyone can see it.
 - This helps to organize the information and keep the information in sight.
 - Likes and dislikes can be different colors (red for dislikes, green for likes).
 - Be careful not to get too hung up on the order in which you cover the information.
 - If you have several sheets of paper taped up, you can bounce between the areas.



Recording the Meeting

Refer to “The Right-hand-The Recorder” found in the “Facilitation Techniques” section of the participant manual. This gives information on ways to record meetings. The facilitator may choose to have another meeting participant assist in recording.

Facilitation Tip:

How the ISP meeting starts also sets the tone for the meeting:

- Consider the person, his or her preferences and needs, and those of the other members. Whether members already know each other well or not, a few welcoming techniques certainly won't hurt to get things off on the right foot. Here are some ideas:
 - Greet people as they come in and thank them for coming. This is basic, but effective.
 - Follow-up on any special accommodations needed. For example, space for a wheelchair at the end of the table or interpreters. Help to make others comfortable as well.
- Offer coffee, juice, or other refreshments that may have been prepared.
- Introduce members if needed to avoid strangers sitting at the table in silence waiting for the meeting to begin.
- "Break the ice" and help people feel comfortable by initiating conversations.
- Pass around the sign-in-sheet if one is used
- Be sure everyone has any materials or written information needed for the meeting. For example, a copy of the last ISP with attachments or the agenda.

Welcome and Getting Started

At the start of the ISP meeting the facilitator should:

- Introduce group members or have the group introduce themselves and their relationship to the focus person. The focus person or the family/advocate may want to introduce the group members.
- Clarify or state the purpose and focus of the meeting. For example, to review John's ISP and focus on plans for a new job.
- Review the roles of group members. For example, facilitator timekeeper, and recorder.



- Review the agenda and ask if anyone (especially the focus person) would like to add something to the agenda.
- Explain the meeting format (the process for how the group will "move through" the agenda)
 - For example, agenda items or topic areas will be discussed in order and discussions or decisions will be written on easel paper.
- Present the expected length of the meeting and any scheduled breaks. After 1 and 1/2 to 2 hours people begin to fade.
- Clearly state any ground rules for the meeting. For example:
 - No cell phones
 - No unnecessary interruptions
 - Information and discussions are confidential
 - Allow time between comments for the person or family to respond
 - No sidebar conversations
 - Let's be informal, feel free to share any ideas and information
 - Meeting will start and end on time
 - Will stay on topic
 - Facilitator will rein in" the discussions if too far afield
 - Add any ground rules the person or family wants



Activity Two: Brainstorming Strategies for Involving People in their Meetings

For this activity we are going to brainstorm ways we can involve individuals in their meetings and the meeting process. Refer to the information on brainstorming and its purpose. This information is included in the "Facilitation Techniques" section of the participant manual.

1. Identify a facilitator, recorder, timekeeper
 - Facilitator: ensures that the rules of brainstorming are being followed, that everyone participates, and that the group stays focused.
 - Recorder: writes the suggestions from group members on the flip chart and follows the guidelines for recording at the end of the Participant manual.
 - Timekeeper: keeps track of the allotted time and informs the facilitator when the designated time has ended.



2. Record suggestions on the flip chart.
3. Stop after 10 minutes.
4. The facilitator now helps the group to select two suggestions that will be presented to the larger group at the end of the activity.

The ISP Review Meeting

Skills and techniques for facilitating an ISP meeting will be presented and discussed within the context of an ISP review agenda. The meeting format follows the 5 sequential steps to planning:

1. Gather information as the basis for planning
2. Identify themes in the person's life
3. Choose personal valued outcomes
4. Identify safeguards
5. Develop next-step strategies and a personal network of assistance (Individualized Service Environment)

Regardless of the format used, these are the 5 areas that are covered at all ISP meetings. Our next activities will show you how to go through the 5 sequential steps.

Facilitation Tip:

- Position your body so you face all the group members. Don't turn your back to part of the group.
- Listen carefully while they talk. Don't shuffle papers or look at your watch while group members are talking.
- Nod affirmatively. Don't remain impassive. Involve and talk to all group members, not just a few.

Step 1: Review/Gather Information

This is the listening and learning part of the meeting that increases our understanding of the person. Group members share and learn new or changed information.

In general, you want to learn:

- New information about the person



- Changes and updates to the former maps (if used). This includes new discoveries or needs that the person may have.
- Significant events since the last meeting (hospitalizations, moves, new family involvement, etc.)

Use the format chosen prior to the meeting to obtain information about the group. This could be a “go round”, responses to questions asked by the facilitator, or asking for changes/updates to former “maps”. Be sure to add your own information as the person’s service coordinator.

It’s a good idea to start with questions and topic areas that the person or family can respond to.

Example questions for gathering information:

- Have there been any key milestones in your life since we last met? What are they?
- Have you made any major moves or transitions?
- How has your health been? Have you been hospitalized?
- What positive experiences have you had recently?
- What difficult experiences have you had?
- With whom do you spend the most time with?
- Have you joined any clubs or organizations?
- Have you had any difficult relationships recently?
- Has your daily schedule changed? Why?
- Do you have any new hobbies or interests? What are they?
- Are you satisfied with the help you get? Why? Why not?
- Has your job changed in any way? What has changed? Why?
- What do you like (and dislike) about your job?
- Do you still have the same job? Day Hab. Service? School?
- What do you like to do in your free time?
- Have you learned any new skills?
- Any gifts, talents, or abilities that were discovered?
- Have your medications changed?
- Do you still like your time alone?

Facilitation Tip:

- Acknowledge ideas
- Ask open-ended questions
- Know when to dig deeper or when to move on to another topic



Activity Three: Asking Questions and Getting Answers

1. Your task is to gather information from the person (individual with disabilities) that will help you to plan. The purpose of this activity is to practice asking questions, to practice different roles in a planning meeting, and to experience the first step to planning (review/gather information). You will be using the “Areas of Discovery” in the resource section.
2. Identify a facilitator, recorder, timekeeper and focus person (person with disabilities).
 - The facilitator ensures that questions are effective and reasonable, that everyone participates, that the meeting stays focused, and that members avoid “grilling” the service coordinator. This person also advocates for the person and has information and recommendations to offer.
 - The recorder writes the person’s answers on the flip chart or white board and can ask questions.
 - The timekeeper keeps track of time and informs the group when the designated time has elapsed.
 - Explain the use of “colors” – blue or black marker for identifying information, green for “things that work for the person” and red for “things that don’t work for the person”. Explain that the use of the different colors helps give a “visual” of the different areas discovered.
3. Stop after 15 minutes.

Step 2: Review/Identify Themes

- Themes are summary statements of information learned that seem to thread through or be patterns in a person's life.
- They are the result of merging and synthesizing the information and may define those things that help to understand the person.



- They are cues or indicators for what should be considered when planning for the person.
- They point the way for what's working or not working for the person and how services and supports should be provided.
- Group members use the new information to review and update the person's themes

Examples of themes:

- A lack of community membership
- The need for a routine
- Likes to be around people
- Has little or no control over his life
- Has multiple health care needs. .

In general, you want to know:

- Have any themes changed in the person's life?
- Are there any new themes?
- Are there any old themes that should be discarded?
- What impact do the themes have on the person's life?

As the facilitator you could review the old themes and ask the person and his/her family or advocate for any changes. The questions could then be asked of the general group or individual members of the group. Be sure to add your own ideas as the person's service coordinator.

A facilitator may want to group information that is naturally related and then tie each grouping to a theme that brings the information together. This is helpful when you have to find the major themes out of a great deal of information. Sometimes this is already accomplished by "maps". When "maps" are not used, developing groups of similar or related information is revealing. For example, grouping the various times and places the person is frustrated or seems contented.



By this time in the meeting the facilitator may need to perform a few tasks to keep the meeting going and focused:

- Clarify, as needed, what the group hopes to accomplish. Stay focused on the purpose of the meeting.
- Guard the meeting agenda and focus to avoid deviating topics or the personal agenda of certain group members. However, identify changes from the agenda that may be needed.
- Summarize where the group is in terms of its agenda, tasks, and process.
- Call for time-outs or breaks.
- Assist the recorder or timekeeper if needed.
- Protect the group from domination by a few individuals.

Identify some of the themes that you found while doing Activity #3:

Step 3: Review/Choose Personal Valued Outcomes

Outcomes are:

- The anchors for the services and supports that the person receives.
- They are the person's chosen and valued destinations.

Examples:

- Learning how to speak up for himself/herself
- Being comfortable and without pain
- Joining the local fire department

In general, you want to know:

- Have any outcomes changed? How? Why?
- Are there any new outcomes?
- Are there any old outcomes that should be discarded?



- What have been the person's successes or progress in the pursuit of his/her outcomes?
- What are the setbacks or obstacles to achieving the person's outcomes? Why?

You want to:

- Review the outcomes and ask the person and his/her family or advocate for any changes. The questions could then be asked of individual members of the group who are accountable for helping the person pursue his/her outcomes.
- Be sure to provide your own input as the person's service coordinator.



Activity Four: Reaching Consensus... "What do I do when someone.....?"

1. You will use the information gathered in activity #3 to reach consensus about the 3 most important valued outcomes in the life of the person with disabilities. Some of you will argue which ones are truly most important.
2. Reach a consensus.
3. Identify a facilitator, recorder, timekeeper, and someone willing to present arguments, or a different point of view, for selecting or not selecting possible outcomes. Examples are in the participant manual.
4. The facilitator presents and defines the issue and allows for a discussion of possible solutions. The facilitator moves the group and the focus person to choosing outcomes and takes action to deal with the person with the "behavior" (other point of view). Other group members should offer the facilitator some tips and support.
5. Record options on the flip chart.
6. Stop after 10 minutes.

Step 4: Review/Identify Safeguards

- Safeguards are supports needed to keep the person safe from harm and actions to be taken when the health or welfare of the person is at risk.
- It is important to review the information gathered at the beginning of the meeting for any changed or new needs the person has that impacts health and safety.
- If the person lives in an IRA, a review of the individual's plan for protective oversight is recommended.



OPWDD: Putting People First

- Safeguards are precautions needed for such things as: allergies, bed-safety, critical medications, being alone, being with others, travel, frequency and emergency hospitalizations (ready to go packet) eating, or self-abuse.

In general, you want to know:

- Have any safeguards changed? How? Why?
- Are there any new safeguards?
- Are there any old safeguards that should be discarded?
- Have there been any situations when the person was at risk?
- Are there any changes to the person's home or work environment that requires new safeguards?
- Has the person's medical condition changed to warrant new safeguards?
- Can the person evacuate his/her home or day work location in case of a fire? If not, why not? (this is a required safeguard)

Review the safeguards (which may be in the ISP form or in the individual plan for protective oversight) and ask the person and his/her family or advocate for any changes. The questions could then be asked of individual members of the group who are accountable for keeping the person safe from harm. This would include waiver habilitation providers.

Identify some safeguards you found during the discovery process in Activity #3:

Facilitation Tip:

“Keeping a meeting going”:

- Check for agreement or disagreement
- Suggest alternatives or options
- Surface conflicts
- Identify any suggestions which have been made that the group has ignored
- Identify when a decision needs to be made



- Identify when a decision has been made
- Provide on-going feedback to the group

Step 5: Review/Develop Next Step Strategies and a Personal Network of Assistance

- This is the culminating step for all the discussions held so far.
- It is the time to decide what has to be done, who will do it, and how it will be accomplished.
- These decisions should include resources available through natural supports and community resources as well as by paid providers.

You want to decide:

- **What** needs to be pursued and accomplished? This is the time to set priorities.
 - What are the person's desired outcomes? (completed in step 3 of the planning process)
 - What are the person's needed safeguards? (completed in step 4 of the planning process)
 - What additional assistance does the person need help with? (these are called "reasons" in the ISP) For example, help with pain management or needed transportation.
 - What clinical assessments are needed, if any?
 - What community inclusion strategies should in place?
 - What obstacles need to be overcome?

One or more of the person's valued outcomes are transferred to waiver habilitation plans, which are written by the habilitation provider. This includes residential, day, prevocational, and supported employment.

- **Who** will help the person? (identify the natural support or paid service/provider) This is the time to obtain commitments.
 - What networks or services are already in place? Who is good at that?
 - Consider new opportunities and ideas discovered during planning.
 - Consider replacing existing supports and services that may not work for the person anymore.

Multiple people can agree to help the person with the same outcome or need.

- **How** will it be accomplished? What action steps are needed?
 - Consider how outcomes and other additional assistance will be pursued.
 - Acknowledge any barriers or obstacles that need to be overcome

This information becomes part of a waiver habilitation or day habilitation plan. It could also be a part of day treatment plans and waiver prevocational or supported employment plans.

- **When** will it be accomplished? This is a timeframe for a specific action, if needed.
- For example, in the next 6 months, the next month, or by a certain date.

Do not confuse this timeframe with the duration of a service in the ISP (which is usually on-going).

Timeframes help people to be accountable and help ensure progress is being made.

Ask the person and family/advocate to prioritize what needs to be pursued or accomplished. Priorities could be sorted into high, medium, and low priority categories. Then ask for the group's input. Decide, with the group, each category in turn. The recorder writes the information on a chart as shown below. Be sure to provide your own input as the person's service coordinator.

Avoid an emphasis on procedural problems that will be encountered.



Activity #5: Making Decisions: Developing Next Step Strategies

1. Members of the group now help the focus person to develop next steps by deciding:
 - What needs to be pursued and accomplished?
 - Who will help the person? (Identify if the person will do it him or herself).
 - How it will be accomplished?
 - When will it be accomplished?
2. Identify a facilitator, recorder, and timekeeper.



- The facilitator guides the group to decision making. If you need to get “unstuck” refer to “Making Decisions” in the Participant Manual under “Facilitation Techniques”. This offers a simple chart for weighing the advantages and disadvantages of options.
- The recorder documents decisions made using the following chart.

3. Stop after 10 minutes.

WHAT:	WHO:	HOW:	WHEN:

Ending the Meeting

Wrapping-up is an important part of meeting facilitation. It provides closure and sets expectations for the next meeting.

- Summarize, briefly, what was accomplished at the meeting with a focus on the end results.
- Make sure the stated focus of the meeting was accomplished.
- State that the ISP will be updated or written based on the information learned and the decisions made at the meeting.
- State that the new or updated ISP will be distributed, with all necessary attachments, to the person and advocate for their approval and signature.
- Set a date, time, and location for the next meeting.
- Thank everyone for attending, especially the focus person and his/her family or advocate.



OPWDD: Putting People First

- Extend your appreciation for everyone's participation, "a job well done", and comment on the value of the meeting to the focus person.
- Take down and keep the easel paper used to record information and decisions



SECTION 5: After the ISP Meeting

The purpose of this section is to provide guidelines and set OPWDD expectations for service coordination tasks to be accomplished after the ISP meeting.

We will be focusing on:

- Follow-up
- Documentation
- Distribution of the ISP

Following-up

Putting plans into action requires the strength, creativity, and especially the commitment of meeting members. It takes patience, time, and fortitude.

The following material highlights service coordination activities after the meeting. Other service providers who are part of planning will also follow-up on their commitments to the person. This includes writing or updating the habilitation plan.

Refer to "After the Plan" in the resource section of this participant manual.

- The service coordinator, as a service provider, now follows through with commitments made at the meeting. For example, a new resource may need to be found, arrangements made for a unique service, or finding a new home or job. These may be part of a person's valued outcome or may be other activities that are most important to the person. Some or all of these high priority service coordination activities are documented on the Service Coordination Activity Plan.
- Keep, photograph and reduce, or transcribe the information from the easel paper. It will be shared with group members at the next meeting (or put back up on the walls) as a starting point for the next ISP review.
- Schedule and arrange for any follow-up meetings decided upon at the meeting. These could be special meetings prior to the next required ISP meeting to handle specific areas or may simply extend or finish the last meeting.
- The service coordinator is responsible for contacting any major service provider or others that were invited but not able to attend the meeting. The purpose is to receive information and give information, especially about the decisions made at the meeting. The service coordinator must contact any waiver service provider that did not attend the meeting.



Documentation

The service coordinator now completes the following documentation:

- Updates or writes an ISP. An ISP summarizes information learned at the ISP meeting. An update is done by attaching an addendum to the existing ISP to make it current.
- Writes a service coordination note that the ISP review occurred. Include the date of the review. This note is signed and dated by the service coordinator.

Distribution of the ISP

- Copies of the ISP (with attachments) are distributed to the person and advocate for their signature.
- Copies of the signed ISP (with attachments) are distributed to:
 - The person
 - His/her advocate
 - All waiver service providers (for example: residential habilitation, day habilitation, consolidated supports and services, supported employment)
 - Day Treatment
 - Respite
 - Article 16, 38, or 31 clinics
 - Other providers and individuals with the consent of the person and/or advocate

Please refer to the ISP instructions for ISP distribution timelines.

This can be found on the OPWDD Website at www.opwdd.ny.gov

The “Facilitation Techniques” and “Additional Resources” in this participant manual will be helpful for future reference.



Notes:

Addendum for Future Reference

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Asking questions and getting answers

Use plain English and avoid acronyms and bureaucratic or technical terms. Ask the group members to explain any terms or acronyms used.

Ask "why" frequently. The reason for a preference or activity can be more important than the activity itself.

Questions are a resource to planning and not intended to feel like an interrogation. Be careful not to grill the focus person and participants.

Asking questions effectively is one of the most important skills you'll need as a facilitator. This means selecting the right type of open-ended question, phrasing it to get the response you're after, and asking the right person.

There are two basic types of questions to choose: open-ended and closed questions. It's better to learn how to ask open-ended question because it elicits a more complete response and more participation.

Closed: "Does everyone understand the changes we've discussed?" This requires a one-word answer and closes off the discussion.

Open: "How has John's life changed since he was in the hospital?" This requires more than a "yes" or "no" answer, and stimulates thinking and discussion.

It's also important to phrase questions so that the group members remain focused:

- Ask clear, concise questions covering a single issue. Don't ask rambling, ambiguous questions covering multiple issues.
- Ask challenging questions which will provoke thought.
- Ask reasonable questions.
- Ask honest and relevant questions.

When handling answers to questions always acknowledge the efforts made and minimize potential embarrassment. For example, "What a great observation", "That's a good point", "Let's write that down; any other ideas that you have?"

When responding to questions:

- Provide the answer when you are the only person who can do so.
- Redirect the question to other group members to obtain answers or promote discussion.
- Defer the question (parking lot) when it is beyond the scope of the group or you need time to get back to them.

What if the person makes a bad or illegal choice?

The following text is from "Program on Employment and Disability", Cornell University, 1999:

A frequent concern for participants is that a vision or dream is "not realistic" or "not possible". It is important for the facilitator to not let these views block the formation of a broad and exciting vision.

Providing each participant with a few minutes to quietly imagine the best future for the focus person, area by area, may help to free people from mental blocks.

Some people ask, "What if a person makes a bad or illegal choice?" Others wonder what to do if the person asks for the moon. Both of these questions result from the same misunderstanding: both assume that the process belongs somehow to the facilitator. But it doesn't. The process offers people a way to clarify what they want and what they are willing to work on together to make happen. Those who know and care about the person, and often those who control necessary resources, need to choose to sign up to help the person. The process offers a way for people to surface and negotiate disagreements about what is right and what they will consent to work on.

Of course, facilitators are responsible for their own ethics and can always say no before beginning the process of helping someone who wants to take a wrong direction like planning a crack selling business or putting someone in an institution. Even in such challenging circumstances, it may be helpful to 'listen under' the 'named goal' before outright rejection, because it may turn out to be the only available term for deeper and richer dreams and goals."

Consensus

How to get consensus	Conditions for consensus	Guidelines for reaching consensus
<ul style="list-style-type: none"> • Present the issue, not the solution • Define the issue • Listen • Record options 	<p>Each team member should be able to say:</p> <ul style="list-style-type: none"> ▪ I believe that you understand <u>my</u> point of view ▪ I believe that I understand <u>your</u> point of view ▪ Whether or not I prefer this decision, I will <u>support</u> it because it was reached openly and fairly. 	<ul style="list-style-type: none"> ▪ Avoid arguing for the sake of "getting your own way" ▪ Avoid changing your mind for the sole purpose of avoiding conflict ▪ Avoid conflict-reducing techniques such as majority vote, averaging, bargaining, coin flipping, etc. ▪ View differences or opinion as natural and helpful, rather than as a hindrance ▪ Be suspicious of initial agreement

Consensus implies that all points have been discussed and modified and everyone has had a chance to be heard so that everyone agrees that it is probably a good decision.

Brainstorming

Brainstorming is a technique for expanding available ideas. It's a free flowing and creative approach to gathering information. It is used to produce lists of ideas, solution, and suggestions.

- Start by defining the problems or topic so that there is a consistent level of understanding.
- Develop the ground rules for brainstorming (see below)
- Write ideas on the flip chart clearly and concisely.
- When ended, review the written material to assure ideas are collected correctly.

Group brainstorming strategies

- Freewheeling (traditional brainstorming). Open group style that emphasizes fast thinking and momentum.
- Individual brainstorming. Ask the group members to take a few minutes individually and write down 5 solutions. This ensures that all participate and minimizes influence by a few.
- Round robin or "go-around". Ideas are shared one by one. Members have the option to pass. This emphasizes collective association since people listen more closely to others suggestions.

The following are excerpts from the Program on Employment and Disability, Cornell University, 1999:

Brainstorming is a way to help the group come up with new options to old problems. It's a technique that goes beyond traditional solutions and considers a broad range of alternatives. Brainstorming can help to keep the planning process positive and non-judgmental and it rewards creativity.

The following are general brainstorming guidelines:

- Emphasize thinking "outside the box"
- Ask different questions
- Suspend judgment
- Emphasize quantity over quality
- Encourage wild ideas
- Involve everyone affected by the solution
- Keep it positive and non-judgmental
- Remember there are no right or wrong answers
- Reinforce and reward all ideas

Getting past the "Yes buts..."

A Key role the facilitator plays in the brainstorming process is to keep the group from evaluating suggestions as they are made and avoiding the "yes but..." which tends to quickly put a damper on participant's willingness to offer ideas and suggestions. Remind the group member that this is a time for gathering all suggestions and not for evaluating those suggestions. The following "yes but..." statements were found in training material developed by the Connecticut University Affiliated Program.

1. We tried that before
2. Our place is different
3. It costs too much
4. That's not our job
5. We're all too busy to do that
6. We don't have the time
7. Not enough help
8. We've never done it before
9. That's too ivory tower
10. Let's get back to reality
11. That's not our problem
12. You're right - but
13. Good thought but impractical
14. Let's give it more thought
15. Not that again
16. It's never been tried before
17. Let's form a committee
18. It won't work
19. What you're really saying -
20. We've always done it this way

Making Decisions

(Excerpts from "Making Futures Happen" by Beth Mount)

The group now has several good options and needs to choose the best alternative, or the group has several options and members disagree on the best options to pursue.

- Weigh the advantages and disadvantages of each option and make a decision. Use a chart to list and describe each option.

Option #1	Option #2	Option #3
+	+	+
-	-	-

- List the advantages and disadvantages of each option. See which option has the most advantages.
- Identify the action steps required for each option.
- See which option has the most advantages and the most concrete strategies for making it happen.

Managing conflict

"Instead of turning a disagreement into an emotional argument, members view conflict as a chance to fully explore issues and differences, to discover new data, and to think about decisions from a number of perspectives. Group members don't hide conflict. The effective member knows that conflict is natural and that a full, and fact filled discussion about the conflict will eventually lead members to a clearer understanding of different points of view. It is the responsibility of all team members to approach conflict and disagreement non-defensively and to discuss differences open mindedly". (Eileen Berg, Ruth Mullen, Shawna Papa, NYSACRA 2002 Conference)

Having stated the expectations for effective group conflict and disagreements, the following are a few suggestions for when conflict or negativity becomes overt: (Program on Employment and Disability, Cornell University, 1999):

- Ignore side or subtle comments
- Redirect the person back to the point at hand
- Record the comment on another piece of paper, and say that we will address this, but not at this time
- Take a break and speak privately with the person
- Restructure the process to help the individual and group avoid the conflict
- Facilitate the group to come up with its own way of dealing with the conflict
- End the meeting

"In general, it is best not to confront people directly in the meeting. If the meeting is not going well, you as the facilitator can stop the process. Even with the best planning ahead-of-time, planning meetings can be ineffective or get out of control. Your responsibility as facilitator is to ensure that the meeting is comfortable, safe and productive for the focus person. If it is not, you need to stop the process. If you can not make the necessary adjustments during a break, do not continue. Go back and meet with the focus person (and significant other if needed) and restructure the process to address the problems(s)."

**"When the person wants one thing,
and his/her family want something else.
What do I do?"**

(Catherine Ludlum, *Tending the Candle: A Book for Circle Facilitators*, 1993)

"Circles (and other group person centered planning processes) are usually noisy, upbeat gatherings of friendly people who share a commitment to the focus person. But there can be other dynamics at work, such as conflict between family members, or political arguments between service providers. Sometimes these disagreements are overt, and must be dealt with as best you can in the circle meeting itself.

Often, however, people don't want to rock the boat. Sometimes a family member may think that the focus person's vision is unrealistic. S/he is certain that when the facilitator knows the whole story (the severity of the person's disability, the cost or distance of the goal, etc.), the facilitator will guide the circle in a more reasonable direction. So instead of expressing concerns in front of other people, the family member may snag the facilitator in the hall and ask if they can talk after the meeting.

In these situations, it's important to hear out the concerns of the family member, but to remain true to the vision of the focus person. Sometimes you can give the family member information that will alleviate some of the objections. For example, if the vision is to attend college, and the concern is the severity of the person's disability, find a graduate who has face similar obstacles and been successful. Or the circle can develop a whole plan that goes something like this: "Here are the courses Tom wants to take next semester. He has met the teachers and they are looking forward to having him in their classes. Here's how he will get to school, and here's how he will take notes and do homework".

But there are times when nothing will win the opponent over, and if the focus person is determined to proceed, there will be conflict. In that case, it is especially important to have other people in the circle who can support the focus person, one another, and you until the storm subsides."

Strategies for involving people in their meetings

There are times, despite the best intentions of keeping the meeting focused on the person, when the person seems (and must feel) like a bystander. This feeling may also be shared by the person's family or advocate when service providers talk in technical terms or global issues. The person may have cognitive limitations or learning disabilities that affect their expressive or receptive abilities. Regardless of the person's abilities, there are some general strategies for involving people in their meetings.

The following is a list from Beth Mount:

- Look at the person frequently
- Address the person by name
- Ask the person questions
- Re-focus questions inappropriately directed towards others, i.e. ""That's a good question. John what would you like to do about getting new shoes?"
- Do not allow the group to hold third person conversations as if John is not there. "It seems like we're all talking about John."
- Prepare! Set up the meeting to make it easier for John to participate:
 - Discuss the meeting with John as much as he needs in order to understand the issues.
 - Develop pictures, visual prompts, etc. to remind John.
 - Many people will remember what they want to say with preparation an hour or so beforehand.
 - Prompts can be helpful: "Remember when we visited Jane's last week? You said you liked something about her house..."
- Pictures or written notes are good for people who are visually oriented.
- Verbal prompts, a word or phrase, are helpful for people who may rely on auditory cues.
- Practice in the actual place can be helpful.
- Find as many things as possible for the person to be involved in during the meeting. Some ideas are:
 - Handing out agendas or other items
 - Introductions
 - Discussing preferences
 - Opening the meeting: "Welcome to my meeting"

Here are a few more ideas for helping people get involved in their meeting:

- Verify or check with the person on the meaning of his or her answer, response, or suggestions before moving on.
- Speak at the focus person's language level.
- Wait for a response from the person.
- Use pictures or technology that facilitate communication.
- Follow the person's lead to change the subject, take a break, or talk more about a subject.

There are two other situations that should be considered when involving people in their meetings: (Michael Callahan and Bradley Garner, "Keys to the Workplace", 1997):

1. The person who is the focus of planning is physically unable to speak and therefore unable to verbally participate in the ISP meeting. This is a unique challenge to the group that takes the time and energy to reach consensus on the true desires and preferences of the person.
 - Take time to find a way the person could possibly communicate (e.g. through some varied type of yes/no response mode, a system for pointing or looking at pictures or representations of preferred activities or choices).
 - Allocate time for sharing experiences with the person to gain some perspective on the subtleties of how this person communicates his or her likes and dislikes, pleasures and pains, and other forms of preference-related concepts. This process should include a means for validating any hypotheses through the use of multiple observers on multiple occasions.
 - Use strategies for seeking the input of close friends and family members who have known the person for a long time and who already possess some firsthand knowledge of the person's preferences and desires.

2. The person who is capable of speaking but is hesitant to share thoughts, ideas, and desires. It may be possible that this person has never been asked to express an opinion or make a decision in this area of life before. Group members should be cautious and patient, and provide support and assistance as follows:
 - Provide activities that encourage the person to make choices
 - Develop trust between group members and the person
 - Respect the dignity and uniqueness of the person
 - Provide new experiences to increase the person's possible repertoire of preferences and desires

<p style="text-align: center;">Strategies for Involving People in their ISP Meetings *****</p> <p>Thanks to all the service coordinators whose ideas are listed. *****</p> <p>Despite the best intentions of keeping the ISP Meeting focused on the person, there are times when this participating individual may seem like a bystander. This may happen in any ISP meeting regardless of the person's abilities. The following strategies for involving people in their ISP meetings were collected from many of the service coordinators who attended the course, "How to Facilitate an ISP Meeting." Thank you for your input.</p> <ol style="list-style-type: none"> 1. Help the person choose a safe and comfortable setting for the meeting. 2. Together with the person, choose who to invite to the meeting, the date and time of day, and send personal invitations. 3. Prepare an agenda with the person ahead of time. What would the person like to talk about? 4. Schedule the meeting on his or her birthday and celebrate! 5. Make the meeting "their day." Maybe go out for lunch or dress up. 6. Bring special items the person likes. Is there something the person would like to bring to show others and "brag" about? 7. Identify difficult or sensitive issues that he person will feel uncomfortable talking about. Determine how they can be respectfully handled. 8. As the person to help set-up the meeting room, arrange the refreshments, pass out the agenda. 9. Bring visual aids such as a photo album or posters. 10. Plan ahead for any needed accommodations. Be sure communication devices are available and in working order. 11. Establish ground rules for all participants: <ol style="list-style-type: none"> a. no side-bar conversations b. keep information confidential c. everyone must participate (one person will not control the meeting) d. stay on topic e. do not interrupt any person when he or she is speaking f. be patient. 	<ol style="list-style-type: none"> 12. Be sure the person is in the meeting room before the others, to get used to the surroundings and meeting participants as they enter. 13. Have the person greet others and help them to a seat if appropriate. 14. Be sure the person is prepared for the meeting. Define his or her comfort zone and help the person know what to expect, why the meetings is being held, and understand his or her role. 15. Give the person a pad and pen to take notes or write down questions. 16. Be mindful of where the person is sitting. Atthe head of the table? Near someone he or she is comfortable with? 17. See if the person would like to have a guest at the meeting for support - someone who could act as a personal coach to help with communication or present a special wish. 18. Maybe the person would like to begin the meeting, introduce everyone, and talk about himself/herself. Maybe the person wants to choose who will speak first. 19. Start off with a joke. Keep the meeting on a positive note and make the meeting fun instead of stressful and judgmental. 20. Give the person the chance to run the meeting and provide input. Give the person time to talk or respond. Let people speak for themselves. 21. Use a flag or switch button for a non-verbal person to get attention. 22. Encourage everyone to listen to the person. 23. Check to see if the person understands what is going on and likes the ideas being discussed. 24. When developing plans, encourage the participants to capitalize on the person's interests and abilities. 	<ol style="list-style-type: none"> 25. Know the person well. Make him or her feel comfortable. Share achievements. Keep a positive attitude. Have the person and others list successes. 26. Pay attention to the person's facial expressions, gestures, and body language. 27. Play the person's favorite music in the background (if appropriate for the setting). 28. Don't rehash the person's past problems or mistakes unnecessarily. 29. Talk with the person, not about the person. Let him or her know that you are listening. 30. Notice if the person begins to get upset, and take a break or provide supports. Respect his or her wishes. 31. Use the name the person prefers throughout the meeting. 32. Find was to redirect those that "put-down" the person's hopes or ideas or have a negative attitude. Find the positive spin. 33. Keep the language simple, on a level that everyone understands. Avoid technical and clinical words to the extent possible. 34. Focus on what the person wants (his or her valued outcomes). 35. Be sure the person is satisfied with supports and services and is able to speak up if dissatisfied with supports and services. 36. Notice the person's attention span and follow the person's lead for taking a break or scheduling another meeting. 37. Dream big. 38. Make the person feel special and in control. 39. Don't patronize. 40. As the person to wrap-up the meeting and evaluate it. 41. Summarize the meeting. Be sure the person understands the decisions made an expected outcomes. 42. Have the person thank everyone for coming. <p style="text-align: center;">*****</p>
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Interactive Skills: Initiating, Clarifying, and Reacting Behaviors

Interactive skills are ways for people to talk to each other at a meeting. The use and understanding of these skills helps facilitators to:

- recognize the types of interactions between group members
- respond effectively to these group interactions
- facilitate a meaningful and productive meeting

Initiating behaviors	<p>Initiating behaviors put ideas out for consideration, creates enthusiasm among participants, and leads the discussion toward future action.</p> <p><i>Proposing:</i> puts forward a new suggestion, proposal, or course of action. Proposals can structure the discussion or move the discussions and decisions making forward.</p> <ul style="list-style-type: none"> ▪ "Let's see if we can discover what you really prefer, John, before we decide where you will be going." ▪ "It's time we heard from John's mother on this one." ▪ "Tom, please write this idea on the flip chart" ▪ "Let's try teaching John how to dial 911 in an emergency." <p><i>Building:</i> extends or develops a proposal made by another person. It validates the original proposal and offers suggestions and ideas that develop it.</p> <ul style="list-style-type: none"> ▪ Propose: "I think Mary would like to go swimming." Building: "How about the YMCA? It's just down the block." ▪ Propose: "I suggest we begin by reviewing the last ISP." Building: "And Mary, you could let us know what's changed." ▪ Propose: "Let's ask Mary's friend to join us at the next meeting." Building: "Yes, she could bring us up to date on how Mary likes some of the new things they've done together."
Clarifying behaviors	<p>Clarifying behaviors increase clarity and mutual understanding and foster deeper analysis of the issues. They also encourage the free exchange of ideas.</p> <p><i>Seeking information:</i> seeks facts, opinions, proposals, or clarification from others. It helps other people feel involved and satisfied that there is an interest in their views.</p> <ul style="list-style-type: none"> ▪ "Do you agree with the plan?" ▪ "I'd like to hear your ideas for how it can be done." ▪ "Are there any other suggestions?" <p><i>Giving information:</i> offers facts, opinions, or clarification to others.</p> <ul style="list-style-type: none"> ▪ "Membership at the YMCA is \$50 a year." ▪ "I don't know if John would be interested." ▪ "I'm worried about safety in the pool."

	<ul style="list-style-type: none"> ▪ "Bob loves parties and being around others." <p><i>Summarizing:</i> brings clarity to discussions because it restates, in a compact form, the content of previous discussions or events. It's always a statement and does not require a response. It is often used to review and conclude a discussion or part of a discussion.</p> <ul style="list-style-type: none"> ▪ "Just to recap that, there are two main issues you want to discuss: Sal's daily schedule and how we can make changes that will give him more new experiences." ▪ To review the discussion, we've agreed that Harry needs more personal space and maybe even his own bedroom." ▪ Before we meet again, res, hab. staff will learn more about how Eileen tells us her frustrations." <p><i>Testing Understanding:</i> seeks to establish whether or not the meaning of an earlier contribution has been understood. It's always a question that requires a response. You put forth your best guess or hypothesis and ask for verification from the speaker.</p> <ul style="list-style-type: none"> ▪ "So, are you saying that you'd rather postpone the meeting?" ▪ "Do you mean you'll be willing to make the changes we talked about?" ▪ "Can I conclude that we agree that this is the best solution?"
<p>Reacting behaviors</p>	<p>These behaviors let people know what others are thinking, help get information out, and facilitate open communication.</p> <p><i>Supporting:</i> makes a conscious and direct declaration or agreement or support for another person or for the person's ideas or opinions. Supporting behavior can vary from the simple non-verbal nod to a long, complex statement of agreement. It values input and encourages more.</p> <ul style="list-style-type: none"> ▪ "That's a good idea." ▪ "I've read the day hab. plan and I like it's approach to helping Bob get his driver's license." ▪ "I guess you're right. Let's give it a try." <p><i>Disagreeing:</i> states a direct disagreement or raises obstacles and objections to another person's ideas. Another way is to state a lack of support for an idea or to declare it incorrect.</p> <ul style="list-style-type: none"> ▪ "I don't think it'll work" ▪ "We tried that before and it didn't work. Besides, we don't have and money and staff." ▪ That's fine, but let's get down to reality. Who's got the time?" <p><i>Defending/Attacking:</i> either attacks a person directly or defends the speaker against someone else. This behavior usually involves value judgement and contains emotional overtones. It's usually about people and moves the discussion away from the issues.</p> <ul style="list-style-type: none"> ▪ "That wasn't by fault." ▪ I think he's right! You always nit-pick any suggestion that would make you change the way you do things." ▪ "If you didn't have such a bad attitude, you'd take my advice."

The Right-Hand — The Recorder

The recorder serves as the right-hand assistant to the facilitator. The role of the recorder is to create the group's record of what participants say throughout the group process. This recording provides a visual tool or instant replay of what is happening.

When recording is done properly, the facilitator and group members are freer to concentrate on the agenda, productivity of the group is increased, and accurate records are kept for future reference.

Who Should Be the Recorder?

There are three ways group members become recorders. Sometimes the facilitator selects one or asks for a volunteer. In some groups, the members rotate this role.

If a recorder is selected before the meeting starts, there's a time for reviewing the procedures with the recorder. If you ask for volunteers at the beginning of the meeting, be sure to ask for those who have performed this role before.

Groups that meet regularly often rotate this role among the members so everyone shares the work and can participate more fully when not serving as the recorder. This also is good training ground for moving into a facilitator's role.

Three helpful characteristics of a recorder include someone whose handwriting is legible, someone who can write quickly, and if a flipchart is used, someone who is comfortable standing up at an easel while writing.

The Recorder's Role

Review the following outline of the role and responsibilities with whomever will serve as the recorder:

SUPPORT THE FACILITATOR – As the recorder, you serve as the right-hand assistant to the facilitator. The two of you are a team so clarify your roles before the meeting, watch for ways you can support the facilitator (such as handing out papers), and periodically ask the facilitator if there are any other ways you can be helpful.

REMAIN NEUTRAL – Your job is to record, therefore you need to remain as neutral as possible during a group discussion. If you have ideas or opinions that you feel would help the group, ask permission to add your input.

LISTEN THEN WRITE – Concentrate on what each person is saying before attempting to write it down. Listen for key phrases and words. If they aren't clear, paraphrase what was said.

DO NOT EVALUATE OR EDIT – You are not to judge nor interpret what was said because this will discourage contributions.

WRITE BRIEFLY – Even though you shouldn't edit, if what is said is too wordy, write down the essence of the idea. Sometimes you'll need to suggest a succinct phrasing, but it's best to ask the person speaking.

RECORD EITHER ON A FLIPCHART OR LARGE PAPER – It helps if the recording is done in front of the group so they can see what has been said and refer to key points. See Chapter 7 for more tips on using a flipchart.

CONTROL THE PACE – If you fall behind with your recording, stop the group until you catch up. If too much information is generated (during brainstorming, for example), ask another person to help record on a second flipchart.

RECORDING WITH FLIPCHARTS EASELS and MARKING PENS

Flipcharts are frequently used in group meetings for recording ideas, solutions, and decisions. The essential equipment consists of an easel to which is attached a pad of blank paper on which information is recorded with felt tip markers.

There are certain general guidelines that ensure that your flipcharts are readable and useful to the group members.

GUIDELINES:

- Position the flipchart so that everyone can see it. Walk to different areas in the room to check for readability. Make sure the easel's legs are firmly positioned.
- Stand at an angle to the easel as you write and then stand to the side while listening to the next speaker.
- Use paper that has faint lines on it so you can write straighter.
- Write in large block letters at least 1 ½ inches high.
- Leave about 2 inches or more between lines.
- Use several colored marking pens.
- Use as few words as possible.
- Abbreviate words and use symbols but make sure the group understands them.
- Highlight key words with:
 - circles
 - boxes
 - underlining
 - arrows
 - pictures
 - contrasting color
- If you aren't sure how to spell a word and you feel everyone's eyes on your back, perhaps joke about it or ask for help.
- Wrote a maximum of 10 lines per sheet of paper.
- Write on only the top two-thirds of the sheet.
- As a sheet is full, tear it off and post it on a wall. Ask someone else to help you with this task.



IF...	THEN...
You are recording the group's input	-Record key words quickly -Check with contributors to be sure you are reflecting their ideas accurately
You wish to have them compare and contrast data.	-Use two flipcharts
You want to display information for a period of time	-Hang pages on the wall with masking tape
You don't have an easel	-Post large pieces of paper on a wall but put a large piece behind it to avoid the ink bleeding through
You want to pre-record information	-Leave a blank page between sheets to avoid bleed through and distraction
You want to look especially professional in front of the group	-Lightly write memory joggers in pencil in the margin of the flipchart page -Practice tearing pages cleanly before trying it in front of the group -Cover flipchart information when not in use

What do I do When Someone.....

The following items are excerpts from "Handling Difficult Behavior at Meetings" by Jeanie Marshall, which lists common behaviors at meetings, possible motivations for each behavior, and suggested actions for managing the situation constructively. While many of the suggestions are directed to the facilitator, most are effective, and some even more effective, when taken by other group members.

DISCUSSES THE WRONG TOPIC

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Misunderstands the topic or assignment ▪ Did not hear the agenda item ▪ Is not paying attention ▪ Seems or is preoccupied with another topic 	<ul style="list-style-type: none"> ▪ Write topic or agenda on flip chart or distribute agendas. ▪ Accept blame: "Something I said must have led you off the topic; let's return to....." ▪ Remind the person or group as a whole of the proper topic. ▪ Use humor that acknowledges topic is incorrect, without "putting down" the person. ▪ Interrupt and re-clarify the topic.

DOMINATES

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Is eager ▪ Likes showing off ▪ Enjoys being center of attention ▪ Is exceptionally well informed and anxious to share information ▪ Is naturally talkative ▪ Displays enthusiasm by talking 	<ul style="list-style-type: none"> ▪ Arrange for everyone to contribute proper structuring can curtail the long-winded. ▪ Say to group at the beginning of the session that we should all keep our comments brief. ▪ Limit the time each person may speak. ▪ Let the person know she or he has been heard. ▪ Ask the group to respond to the dominant one. ▪ Interrupt, emphasizing task and time. ▪ Say, "That's an interesting point. Let's see what the group thinks about it." ▪ Us the person for summarizing. ▪ Give individual a job (e.g., taking minutes, recording ideas on the flip chart).

RAMBLES

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Is preoccupied with own interests ▪ Is unaware of, or uninterested in group purpose or goal ▪ Misunderstands group goal ▪ Likes to talk 	<ul style="list-style-type: none"> ▪ Set group goals initially; restate them to keep everyone, especially the rambler, on target. ▪ Thank the person and focus attention by restating relevant points. Move on to another individual. ▪ Remind individual and group as a whole that time is limited. ▪ Set a standard of limiting comments to, say, two minutes. ▪ Question ramble, directing her or him to the subject and task. ▪ Emphasize time, task, and structure.

HIDES A PERSONAL AGENDA

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Wants to do something different from the stated meeting intent ▪ Wants to do something in addition to the stated meeting intent ▪ Seems or is preoccupied with an issue outside the meeting scope ▪ Misunderstands the purpose of this meeting or this group ▪ Wishes to be in control ▪ Has high opinion of group potential and tries to stretch members 	<ul style="list-style-type: none"> ▪ Clarify meeting intent initially, checking consensus with group members. ▪ Encourage members to express personal goals, so that irrelevant issues can be identified and passed to appropriate place or person. ▪ Watch for evidence of personal or secret agenda items; ignore or confront them, as appropriate. ▪ Refocus on stated agenda if meeting seems to be moving to achieving the purpose of a single individual. ▪ Remind individual that "We really <u>must</u> stay on track," if he or she spends meeting time on a hidden agenda item. ▪ Acknowledge that the individual's topic, if revealed, is important and can be discussed at another time. (Specify time, if possible.)

HOLDS A SIDE CONVERSATION

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Finds session unresponsive to personal needs ▪ Is uncomfortable talking to entire group ▪ Wants to catch up on other information ▪ Needs to inform someone about important matter 	<ul style="list-style-type: none"> ▪ Comment that generally you find it is more satisfactory if only one person talks at a time. ▪ Ask if it would be helpful to have some smaller "buzz" groups for a few minutes which can then report to the total group. ▪ Assume that whatever is being said is important. "It would be beneficial if we could all hear what everyone is saying." ▪ Walk toward and stand near those who are talking ▪ Stop talking. When side-talkers stop their conversation, continue speaking to the group. ▪ Give persistent side-talker a job (e.g., taking minute, recording ideas on the flip chart). ▪ Suggest that if it is necessary to communicate during the meeting that they write notes so that conversations will not distract others. ▪ Rearrange seating to move known side-talkers away from each other. ▪ Call one side-talker by name, asking an easy question. ▪ Avoid embarrassing the offenders, unless all else fails. ▪ Relate back to the ground rules....No side-bar conversations.

DIGRESSES

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Misunderstands task ▪ Seems or is preoccupied with another issue ▪ Enjoys being center of attention 	<ul style="list-style-type: none"> ▪ Accept blame, "Perhaps I was unclear." ▪ Acknowledge that the individual's topic is important and can be discussed at another time. (Specify time, if possible.) ▪ Remind individual that "We really <u>must</u> stay on track," if he or she persists. ▪ Identify participant's contributions as digressions, if they continue.

COMPLAINS

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Has pet peeve ▪ Enjoys quarreling ▪ Is having a bad day ▪ Has legitimate complaint 	<ul style="list-style-type: none"> ▪ let him or her know that gripe has been heard (if appropriate, acknowledge agreement); direct group forward. ▪ Acknowledge you appreciate assessment of problems and negative forces; direct group to seek <u>solutions</u> to these. ▪ Record complaint and assure individual that it will be considered and/or passed along to the appropriate person. ▪ Indicate that you will discuss problem with her or him privately, later. ▪ Check with other group members. If it is a common problem it may be wise to deal with it immediately and constructively; if not, move on. ▪ Allow group to handle individual. ▪ Ask, "What possible solutions can you suggest?" ▪ Indicate time is short; remaining time must be spent finding solutions.

ASKS FREQUENT OR IRRELEVANT QUESTIONS

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Is curious ▪ Has experience with similar situation and wants to help this group keep out of trouble ▪ Wants to be center of attention ▪ Is not paying attention ▪ ▪ 	<ul style="list-style-type: none"> ▪ say to the whole group, "please hold your questions until the end of the report" on the assumption that many of the questions will be answered during the report itself. ▪ Thank the individual who persistently asks questions and ask group if others have questions. ▪ Give the individual a job (e.g., taking minutes or recording ideas on the flip chart.) ▪ Ask if others have questions, even calling others by name. ▪ Say, "I'd like to hear from some of you who have not yet spoken. ▪ Suggest, "Let's take a few moments to all think quietly about this issue before discussing it (or before asking questions about it)." ▪ Say directly to the individual, "When you ask so many questions, I wonder if you are listening to what we have already said." Or, "When you ask so many questions, I wonder if you are just trying to slow us down."

ACTS PASSIVE-AGGRESSIVELY

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Is annoyed with one or more group members or with facilitator▪ Feel personal needs are not being met▪ Seems or is preoccupied with an issue outside the meeting scope▪ Has a hidden agenda▪ Wants to be center of attention	<ul style="list-style-type: none">▪ Structure the meeting so everyone focuses on agenda item rather than personalities.▪ Allow members to express personal goals for group and/or for meeting.▪ Inquire if the individual wishes to discuss a particular issue.▪ Ignore the situation if it does not negatively affect you or the rest of the group.▪ Use humor that will encourage yet not embarrass the individual.▪ Avoid arguing with the individual or trying to be a therapist.▪ Discuss concerns privately with individual at break time, if all else fails.

ARGUES

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Is naturally combative▪ Is having a bad day▪ Feels his or her needs are not being addressed▪ Is annoyed with one or more group members or with leader	<ul style="list-style-type: none">▪ Be fair. Give <u>all</u> persons a chance to express opinions.▪ Restate views so individual knows that she or he has been heard clearly.▪ Repeat task and time limitation.▪ Designate a later time when subject can be discussed more fully.▪ Find points arguing sides have in common.▪ Control own temper and try to keep group members from getting overly excited.▪ Do a force-field analysis (list positive and negative forces for the suggestions).▪ Encourage group to respond to arguments.▪ Discuss concerns privately with individual at break time, if all else fails.

ATTACKS GROUP OR INDIVIDUALS

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Is angry about something related or unrelated to this meeting▪ Dislikes one or more group members or the facilitator▪ Wants to embarrass, hurt, or "put down" others▪ Finds group or meeting unresponsive to personal needs▪ Is naturally aggressive or combative	<ul style="list-style-type: none">▪ Protect group and all its members, including the one on the attack.▪ Direct or redirect all comments to the issues or tasks and away from personalities.▪ Restate goal or immediate agenda item.▪ Do <u>not</u> fight back.▪ Lower your voice to achieve great control and reduce the negative emotions.▪ Acknowledge the individual's right to leave the meeting.▪ Question the attacker's commitment to the goal.▪ Say that you will not tolerate aggressive behavior.

CLASHES WITH OTHERS

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Does not like one or more group members▪ Enjoys being divisive▪ Wishes to embarrass or hurt others	<ul style="list-style-type: none">▪ Focus on group goal or problem to be solved, not on personalities.▪ Ask that personalities <u>not</u> be brought into discussion; turn to task.▪ Allow points of disagreement to surface so that they can be dealt with, moving attention from personalities.▪ Emphasize points of agreement minimize points of disagreement.▪ Seat two clashing members <u>beside each other</u>, not across from each other.▪ Brainstorm alternative suggestions for dealing with the issue, allowing group as a whole to focus on goal.▪ Introduce an objective member into the discussion▪ Emphasize common goal and ask how each relates to it.▪ Request members stop arguing.

EXPRESSES NEGATIVE ATTITUDES

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Is displeased with the current situation ▪ Is generally negative ▪ Has a legitimate complaint ▪ Wants to be center of attention ▪ Disapproves leadership or how meetings are conducted. ▪ Feels frustrated about previous group decisions 	<ul style="list-style-type: none"> ▪ Acknowledge that you have heard what the individual has said. ▪ Keep the tone of the meeting positive. ▪ Check with other group members to see if attitude is supported by others. ▪ Move group to solving the problem or discussing the appropriate agenda item. ▪ Say, "That's one perspective, I have a different one." Or, "That's one perspective, does anyone have a different one?" ▪ Inquire, "What solution would you suggest?" ▪ Help the individual to express <u>specific</u> statements or examples rather than vague negative generalizations.

IS OBSTINATE

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none"> ▪ Does not want to change a prejudgment ▪ Has little or no identity with group goal ▪ Feels ownership of an idea or project not felt by the group ▪ Misunderstands or did not hear others ▪ Is having a bad day ▪ Is naturally stubborn ▪ Does not feel part of the group ▪ Has not had opportunity to explain reasons 	<ul style="list-style-type: none"> ▪ Be certain individual is heard. ▪ State or restate group goal. ▪ Do not argue. ▪ Search for solution acceptable to all, using problem-solving methods and consensus. ▪ Allow group to decide to eliminate individual's idea. ▪ Acknowledge that group must make decisions. Set time limit on discussion. Then insist the idea die. ▪ Say that time is short; you'll be glad to discuss it later. ▪ Ask individual to accept group viewpoint for the moment; later there may be time to explore his or her viewpoint more fully.

MAKES WRONG OR INAPPROPRIATE REMARKS

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Has not heard previous discussion▪ Misunderstands agenda or others' remarks▪ Is unprepared▪ Is misinformed▪ Is illogical	<ul style="list-style-type: none">▪ Handle with care.▪ Say, "Let's check the facts."▪ Respond, "that's a possibility." Or, "That's one way of looking at it."▪ Comment, "I see your point. How can we equate that with this?"▪ Questions the individual.▪ Allow group to answer him or her.▪ Ignore the misstatement there may be no point to drawing attention to it.▪ State honestly that you do not agree.

REQUESTS THE FACILITATORS OPINION

Note: this is more of an issue when the facilitator of an ISP meeting remains neutral. However, a service coordinator acts as both professional service provider and facilitator. In this situation, not all of the below may apply.

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Is simply looking for the facilitator's direction or advice. As a service coordinator, this may indeed be appropriate.▪ Attempts to get the facilitator to support one side.▪ Wants to put the facilitator on the spot.▪ Respects the facilitator's opinion and wants to hear it.	<ul style="list-style-type: none">▪ Clarify initially what your role is: facilitator and service provider. Restate this, if necessary.▪ Avoid being solver of group's problems; help the group make its own decisions.▪ Do not take sides. However, you want to advocate for the person with disabilities.▪ Delay giving an answer. "First let's hear some other opinions." Or, "I feel it would be inappropriate to give my personal opinion at this time."▪ Defer to group, "Let's hear what group members have to say."▪ Give a direct answer; there are times you should. Especially as a service provider.

RESPONDS TOO QUICKLY

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Wants to be helpful▪ Knows the answers and wants to express them▪ May or may not want to exclude others from participating; result is the same	<ul style="list-style-type: none">▪ Thank the individual and ask group if others would like to help.▪ Give the individual a job (e.g., taking minutes or recording ideas on the flip chart.)▪ Question others whom you know to have information or opinion, calling them by name.▪ Use individual to summarize.▪ Give others an invitation to speak, "I'd like to hear from some of you who have not yet spoken."▪ Suggest, "Let's take a few moments to all think quietly about this issue before discussing it."▪ Tease the individual gently, noting how quick he or she is.▪ Say directly to the individual, "When you respond so quickly, others don't have a chance to think."

SAYS LITTLE OR NOTHING

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Is naturally quiet▪ Is bored▪ Feel superior▪ Is timid▪ Feels uncomfortable or shy with group▪ Is indifferent▪ Is preoccupied▪ Is having a bad day▪ Prefers to listen	<ul style="list-style-type: none">▪ Create a climate that is conducive for all group members to express themselves.▪ Value the contributions of <u>all</u> members and protect them from being "put down".▪ Ask, "Is there anyone who wishes to speak who has not had the opportunity?"▪ Use caution about singling out a timid individual for an opinion. It may only embarrass.▪ Say directly to the individual, "We want to hear your viewpoint, too."▪ Allow, encourage, but do not insist the individual speak. Everyone has the right to participate silently. Permit her or him the privilege to simply listen.▪ Make eye contact with the quiet individual near the end of the meeting to see if he or she wants to speak; perhaps the person is processing the information internally and may have a contribution that acts as a summary.

SPEAKS INARTICULATELY

POSSIBLE MOTIVATORS	POSSIBLE ACTIONS
<ul style="list-style-type: none">▪ Lacks capability to put thoughts into words▪ Lacks experience putting thought into words▪ Is surrounded by very articulate persons, emphasizing her or his problem	<ul style="list-style-type: none">▪ Use patience and good judgment. Patience is needed to help the individual with expressing thoughts; judgment, to keep group alert and interested.▪ Avoid phrase "What you mean is....."▪ Say, "Let me repeat that." Or, "Let me see if I understand." Then repeat the person's ideas, as you understand them. (This is an effective technique - used with both the articulate and the inarticulate - for summarizing and checking your understanding.)▪ Restate what the speaker said. Avoid changing the individual's idea; just adjust words so they make more sense. Check with the individual to be certain that your restatement is acceptable.

Areas of Discovery

<u>Relationships</u>	<u>Background</u>	<u>Challenges</u>
<p>Who is the person close to? React positively to? Who does the person trust? Does the person have friends? Who does the person go to or reach out for? Talk to?</p>	<p>What is the overview of the person's life experiences? What positive experiences has the person had? Have there been any traumas, loss or grief? What hasn't worked in the past? Are there any stories about his/her life the person wants to tell?</p>	<p>What are blocks to new opportunities? Obstacles to pursue outcomes? Any temporary setbacks? How does the person handle change?</p>
<p><u>Abilities and Skills</u></p> <p>What are the person's talents? Capabilities? Skills? Gifts?</p>	<p><u>Health</u></p> <p>Are there any conditions that threaten the person's health? Promote the person's health? Does the person have any physical limitations? Medical conditions?</p>	<p><u>Culture</u></p> <p>Does the person have any cultural traditions? Strong cultural ties? Beliefs? Values?</p>
<p><u>Preferences</u></p> <p>What food does the person like? What are the person's Interests? Likes? Hobbies? Personal space needs?</p>	<p><u>What works for the person?</u></p> <p>What makes the person happy and bring joy? What things create comfort? When does the person smile?</p>	<p><u>Motivation</u></p> <p>What has personal pay value for the person? What positively or negatively motivates the person?</p>
<p><u>Places</u></p> <p>Where does the person spend time? In segregated sites? In the community? During the day? During evenings and weekends? Where does the person like to be?</p>	<p><u>What doesn't work for the person?</u></p> <p>What makes the person frustrated, angry, or cause boredom? What does the person dislike?</p>	<p><u>Hopes and Dreams</u></p> <p>What does the person want to try? Achieve? Experience? What are Mom and Dad's hopes and dreams? What is the person's positive vision of the future?</p>
<p><u>Accomplishments</u></p> <p>What has the person accomplished in life?</p>	<p><u>Lifestyle</u></p> <p>What is the person's daily routine? Life patterns? What characterizes the person's lifestyle?</p>	<p><u>Fears</u></p> <p>Is there anything the person is fearful of? Anticipated transitions? Harm?</p>
<p><u>Contributions</u></p> <p>How does the person contribute to the richness of his/her own life and the lives of those around him/her? At home? At work? In the community?</p>		<p><u>Decision Making and Control</u></p> <p>What control does the person have over his/her own life? Does the person make decisions?</p>

<p><u>Personal Characteristics</u></p> <p>Are there any personal characteristics that earn the respect of others? That causes rejection?</p> <p><u>Communication</u></p> <p>How does the person communicate feelings, fear, choices, decisions, joy, and sadness, pain? Is any special assistance needed?</p> <p><u>Community Inclusion</u></p> <p>Is the person a valued community member? Does the person belong to clubs and organizations? Does the person do volunteer work? Does the person have valued roles at work and in the community at large? What are the person's reactions in large groups? Community outings? What help does the person need in the community?</p> <p><u>Spirituality</u></p> <p>Does the person have a religious affiliation? Does the person attend or would like to attend church? How does spirituality impact his/her life?</p> <p><u>Clinical Information</u></p> <p>That impacts planning</p>	<p><u>Choices</u></p> <p>Does the person have opportunities to make choices? What personal choices does the person make on a daily basis? Are the person's choices listened to and supported? Does the person receive encouragement to make choices and decisions?</p> <p><u>Learning</u></p> <p>Does the person have opportunities for new experiences? Does the person learn new skills? What skills would the person like to learn? What educational goals does the person have?</p> <p><u>Supports</u></p> <p>What supports are currently available to help the person live a successful life? Are there any natural and community supports? Paid supports? What supports and services don't work for the person anymore?</p> <p><u>Non-Negotiables</u></p> <p>What can't the person live without? What does the person feel very strongly about?</p> <p><u>Beliefs</u></p> <p>What does the person believe in? About himself/herself? Others?</p>	<p><u>Satisfaction</u></p> <p>Is the person satisfied with the supports and services received? With his/her lifestyle? Daily routine?</p> <p><u>Enjoyment</u></p> <p>What does the person like to do for fun, leisure and recreation?</p> <p><u>Independence</u></p> <p>Does the person have or want any freedoms? What would the person like to do independently? What level of supervision does the person need? Are there any mobility issues or needs?</p> <p><u>Safeguards</u></p> <p>What needs to be in place to keep the person safe from harm? Adaptive equipment?</p> <p><u>Habits</u></p> <p>What personal habits work for the person? What doesn't work anymore?</p> <p><u>Values</u></p> <p>What does the person value in life? What is important to the person?</p>
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"Think Before You Plan"

by Michael Smull

Try to learn of the challenges/issues present in developing and implementing the plan before you begin. If this is a person whose parents or guardians have views of what is important to the person that are different (from the views of the person) try to determine how those differences can be addressed. It usually helps to set aside time to listen, to find common ground, before formal meetings. Always talk with the focus person about her/his options and support her/him in deciding how to proceed. Occasionally the best short-term solution is to not to do a full plan but to help the person to find the best short-term compromise.

Do not forget that while someone may want something that their parents see as unsafe, he/she may also want to maintain a good relationship with her/her parents.

Do not forget that we all want mutually exclusive things (e.g. to be skinny and eat whatever we want or to be rich and work in human services), that part of your job is to learn what these mutually exclusive things are and to help the person find a balance that works for them.

Where what the person wants is not supported by those whose consent or assistance is needed for that person to get it, be careful. Do not engage in a process where hopes are raised, only to be crushed. (Be honest about what you can do.)

Remember that the best negotiation is one that no one notices. If you can learn about likely conflicts before that planning starts you can design a process where:

- Everyone feels that they were listened to and that they participated in a respectful process.
- Common ground is identified and nurtured (often starting with agreement that all of us have the same ultimate goals - for the person we are planning with to be happy and safe).

After the Plan

by Michael W. Smull

Learning how people want to live and then doing nothing with the information is a form of abuse. A good plan not only clarifies what each individual wants but creates the perception that those who participated in the planning will do something about it. Planning should only occur where there is a commitment to implement. The challenge in implementation is where to start. The disparity between how people want to live and how they are living often creates a feeling of being overwhelmed, of not knowing where or how to start. The following is an effort to assist those who are engaged in this struggle and to reduce implementation to its essential elements.

Learning how people want to live:

The process of implementation of a person centered plan begins with learning how people want to live through a structured process of asking and listening. Honest planning is never finished. People continue to grow and change. As what is important to them changes and as our understanding continues to deepen, the plans should change. Plans are a snapshot of how someone wants to live today, serving as a blueprint for how to support someone tomorrow. They need to be written down so that we have a benchmark of how people want to live. Honest plans also reflect how each individual wants to live, not how we think they should live. Plans should reflect the typically modest wishes and desires of the person and not represent fantasy of the "good life" from the person doing the planning. Person centered planning can be learned by reading and practicing but it is easier (and safer for people with disabilities) to learn from others who have been trained.

Continuously considering issues of health and safety:

Doing person centered planning does not relieve us of the obligation to address issues of health and safety. People who are unusually vulnerable need to have safeguards and people with medical needs must have adequate health care. The challenge is to consider these issues within the context of how the person wants to live. In the flow chart this is shown as occurring after the comparison between how people want to live and how they are living. Its presence near the top of the process is in part symbolic. In careful implementation, issues of health and safety are not considered only once, they are continuously considered. The challenge in implementation is to enhance safety and ensure health without compromising those things that are important to the person. Once there is an understanding of how the person wants to live, any compromises in what is important to the person are made consciously, after efforts have been made to think of how the person can have what is important and still be safe and healthy

Comparing how the person wants to live with how the person is living:

Comparing how people want to live with how they are living is a form of discrepancy analysis. The result creates the agenda for action. Knowing what is important to a person (and knowing how important it is) is followed by looking at how the person is living now and determining to what degree each of these things is present or absent. Careful consideration of the difference between what people want and what they have shows what parts of their lives make sense and what parts do not.

Giving credit for those things that are being done that do make sense (and continuing to do them):

It is important to not only highlight the need for change but to highlight those things that are being done well. There is an unfortunate tendency to wallow in blame and guilt when the discrepancies are seen between what is important to the people and how we have been supporting them. A sense of urgency is needed but guilt is not

helpful. Rhonda's story illustrates these issues. How Rhonda was being supported Monday through Friday reflected a deep caring and understanding of how she wanted to live. Although she does not use words to talk, staff who loved her were listening to her behavior and honoring her positive rituals and choices. As a person centered plan was developed with Rhonda, it became clear that the weekend staff did not know her as well and were not listening. The reaction of the people who supported Rhonda during the week was dismay and determination. They were pleased at how much they knew and dismayed at how it was not being used help Rhonda on the weekends. Talking about what was going well validated the efforts of the direct care staff who loved Rhonda and were listening to her. Looking at the discrepancy reframed what had been seen as her "behavior problems" on weekends into a problem with the support she was being given. It gave a sense of direction.

Changes that can be made within current structures and resources:

Rhonda's life also provides an example of how needed changes can occur within current structure and resources. Planning with Rhonda made it clear that she must be supported by people who are calm, soft spoken and not "in her face". She must be supported by people who understand how she communicates with her behavior, who listen to what she is saying. Some of the people supporting her on the weekends were not calm or soft spoken and tended to "get in her face". They were the wrong people to support Rhonda. They were not "bad" people, it was a bad match. With some rearranging of where people worked Rhonda began to have weekend support that made sense to her. The staff who know Rhonda also developed a "cheat sheet" that told how to interpret what Rhonda was saying with her behavior. For example, everyone who supports Rhonda now knows she tells you when she wants to get up in the morning by being on her stomach, propped up on her elbows. Her "problem behavior" is gone and someone who was labeled "nonverbal" is now described as "outspoken".

Those that require changes in current structures and/or resources:

Some of the issues in Harry's life illustrate how some changes can be made immediately while others will take time and require changes in structure. Harry will not eat with people that he dislikes and shares his house with a roommate whom he strongly dislikes. He does like eating in his room, by himself. Using typical "group home thinking" staff used to say: "We eat family style and we all eat together." As staff learned about choice they were willing to support Harry eating in his room except that it would not be "fair" to another roommate. Harry had another roommate who liked to store food in his room. Staff felt that they could not want to let Harry do something that another person in the house could not do. They did not feel that fellow who "hoarded" food could be allowed to eat in his room because it would create a health issues as perishable food aged. In trying to honor choice, staff were saying that Harry did not have to eat with everyone, but there were no in home alternatives. Harry could, and often does, eat with friends and relatives who live elsewhere but he was also simply not eating some nights.

When we did the planning with Harry, the fellow who stored food in his room had moved, so "fairness" was no longer an issue. (If that roommate had been present the argument would have been made that treating everyone the same in this circumstance is inherently unfair.) As the issues for Harry were reviewed, it was clear that supporting Harry in eating in his room made sense. Harry left the planning meeting with a "dining" table for his room (that had been stored in the basement) and was going home to have supper in his room. The staff who support Harry had committed to find a way for Harry to only live with people that he chose (and liked). However, helping Harry move requires that the agency figure out the finances involved in closing the group home. While this will take time, in the interim Harry will be happier and will eat regularly.

Harry's story also brings up an issue of health. Since Harry has no unusual medical issues skipping an occasional meal is not a problem. The concern is that he would skip enough meals to unbalance his nutrition and/or to cause him to lose too much weight. Harry does not have enough money to eat out all the time and he does not eat with

his friends every night. He was skipping enough meals to have a noticeable weight loss (although not enough to raise immediate health concerns). Neither depression nor an eating disorder seemed to be needed to explain his not eating at home. Hating one of his roommates and having no alternative appeared to be sufficient explanation. Eating in his room is the temporary solution He still eats out as he can afford it and he eats with friends and relatives as often as he is invited.

A life that makes sense to the individual:

The desired outcome is a life that makes sense to the individual. How each person wants to live should be congruent with how they are living. This does not mean that everyone gets everything that they want. Some things are beyond our power to provide, some things take time, and some things cost more than we can afford A women I met in Chicago told me that the only living situation acceptable to her was to live with her mother. Unfortunately, her mother made it clear that regardless of the supports offered she was not prepared for her daughter to return home. To help this women achieve a life that makes sense we have to help her deal with the loss of her home with her mother and to develop other relationships.

Many of those things that are important to people take time to achieve. For people living in group settings, the changes that are possible will not work for everyone. If you hate one of your roommates, not having to eat in the same room helps. However, it does not address the underlying issue that you should be able to pick who you live with. Because sites are funded rather than people, because having one or two people move may leave a deficit that cannot be covered, helping people leave group settings takes time. Moving to a new place requires that we not only know how people want to live but how we can pay for it. Where group homes are being closed, disposing of the building may require significant effort. Helping people leave group homes can be done and should be done, but it does take time.

Many people say that they want to live by themselves. This is the request that most often challenges the disability system The easiest way to control costs is to share them. By requiring that people share housing and staff, costs are reduced. Where people live by themselves this economy is absent. If everyone wanted to live by themselves the disability system would never be able to bear the cost However, if only a small percent want to live by themselves at any one time it should be affordable. Many people want to try living by themselves, but only a few people like it as a permanent way of life. Further, many people have been forced to share their lives with their roommates and need to experience what just sharing space is like. (When you share lives you do everything together, when you share space you sleep in the same house and otherwise select what you do together.)

Home ownership is another example of something that appears too costly. The disability system has made it possible for agencies to own thousands of houses but sees home ownership for individuals as too expensive. It does take time, knowledge, and commitment but people across the United States and Canada are finding ways to buy their own homes. It is only too costly when it is seen as something which should be solely financed by the disability system.

Home ownership is also an example of a dream. Whenever a dream for the future is expressed there are a few questions that should be asked. The first question to ask is whose dream is this? Most people need to have a life before they begin to have dreams of things like owning their own home. Check and see if it is really their dream or is it the dream that the facilitator thought they should have. If it is their dream, does it really need to happen tomorrow or is it something to work toward? Simple dreams like living only with people that I like, only being supported by people that I trust, or having privacy in the bathroom, should be achieved quickly. Expensive dreams, extraordinary dreams, which are the person's and not the product of a guided fantasy, become something that the person should be supported in working toward.

Remember to keep listening:

Whenever people are empowered a dynamic situation is created. The process of listening and then acting on what has been heard is an ongoing cycle. What people want today will be different from what they want tomorrow. The process is lifelong and interactive. The only thing worse than never listening is only listening once. The process should continuously loop back, comparing how people are living with how they want to live. Where there are differences a plan needs to be developed to help the individual to continue the pursuit of happiness.

“Supporting People with Severe Reputations in the Community”

An excerpt by Michael Smull and Susan Burke-Harrison, 1992

The people who need to be invited are those who know the person the best and those who are essential in the implementation of the plan. People who really know the person can help sort out what is a non-negotiable and what is a highly desirable. You need not invite all who must approve the plan but you need the people who will be responsible for its implementation. They will be educated by the process. Many of them will meet the person (rather than the reputation) for the first time. If you can move the whole person to the foreground and the reputation to the background, skeptics can be changed to allies through their participation in a good planning meeting.

However, this is another area where common sense and good judgment must prevail. People who have profoundly negative feelings about the individual will adversely effect the meeting process and outcome. Do not invite them. Among those who know the individual there may be some whose schedules just do not allow for them to come when all of the other key participants can come. You will then have to determine whether to rely on an interview to convey their information and insights or to delay the meeting.

Finally there are the key people who are really needed but are “burned-out” on the individual and/or meetings about the individual. The first step in convincing them that this process is different is to spend time listening to them. Most typically they will agree if they feel that you appreciate all of their past involvement with the individual. You do not need to convert them into enthusiasts prior to the meeting; you just need them to agree to participate in the meeting.

Look for family or friends who are available and interested in the individual. They are typically the best historians for the individual’s like and dislikes over time as well as for information about the times when things went well. Unless they appear to be a destructive force in the life of the individual, encourage their involvement in the planning for the person as well as the eventual supports. The key word is “encourage”. Do not coerce, use guilt, or otherwise manipulate family into promising involvement that they will not e able to sustain.

Some special considerations must be taken in deciding which professionals can and will participate in person centered planning, and how to assist them in going beyond the limits of their traditional roles. We typically find no shortage of professionals who can tell us what is wrong with an individual. To understand the person, we need to be able to talk to people who know the person rather than their disabilities. We need to talk to the people who know what is right with the individual, who can tell us why they like the individual.

Find the people who enjoy spending time with the individual. There re no rules about who these allies can or cannot be. For individuals who live in institutions, they may be from housekeeping or be from the professional/management staff. The only rules for selection are that these people must like the individual and enjoy spending time with him (or her). Look for people who spend extra time with the individual. If there is no one at this moment, start going back in time. Where someone has lived in the facility for years, there are almost always people who really know and care about the individual.

Behaviors That May Escalate Emotionally Charged Situations

1. Poor listening practices
 - interrupting
 - finishing other's sentences
 - jumping to conclusions about what is going to be said before it is said
 - other nonverbals indicating inattentiveness, impatience, or distraction (tapping a pencil, shifting papers, shaking one's leg up and down, clearing one's throat)
2. Personalizing the conflict right away. Defining it as directed towards you as a person rather than towards your *role* or the situation itself.
3. Failing to acknowledge other's feelings.
 - Not allowing the other person adequate time to ventilate their feelings
 - Failure to acknowledge the other person's feelings
4. Failure to pick up on the other's nonverbal/verbal cues. Very often a person's nonverbals will indicate how they are actually feeling before they begin to verbally express it, i.e., crossed arms, furrowed brows, etc.
5. Discounting/downplaying
 - Making statements like "It can't really be all that important or I would have heard about this before now" or "It can't be all that bad now can it."
 - This can result in the person feeling the need to "up the ante" in order to make you realize *how* important or bad it really is.
6. Judging/blaming. Making statements like "Well, if you hadn't waited so long, maybe I could have..." or "It's really your own fault."
7. Stereotyping/discriminating. Preface statements with phrases like "your people", "you people", "all women", "all blacks," etc.
8. Assuming the "critical parent" posture. Moralizing or reprimanding the person and treating them as a child, i.e., "ell, if you had only listened to me..." or "I told you from the very beginning..."
9. Using "you" statements. Statements such as "you're always doing this" instead of "I" statements such as "I don't appreciate when you ____ (insert behavior)."
10. Attacking/accusing. Either by ridiculing, name calling, put downs. or direct verbal confrontation.
11. Distracting/side tracking. Trying to change the subject before the person is ready or attempting to focus on a small piece of the issue being raised.
12. Placating/humoring.
 - The "now, now" approach.
 - Making statements like "if you just calm down, I know you'll realize..."
 - Using humor as an attempt to "lighten up" the situation. While the intent may be to diffuse the emotionally-charged atmosphere building, it may serve to do just the opposite, since in the heat of anger, most people fail to see the humor and view it as a discount of them.
13. Denial. Totally denying the problem/situation being presented, i.e., "I don't know what you're talking about" or "that's not the way it happened at all..." vs. "I understand your position. However, my perspective on what happened is slightly different..."

How to Effectively Manage Emotionally-Charged Situations

1. Recognize and acknowledge the person's feelings.
 - Allow the opportunity for the person to ventilate their feelings.
 - Empathize with how the person is feeling.
2. Label the feelings being expressed and *stop* talking.
 - "You sound very angry and like you feel the rug is being pulled out from under you..."
3. Try not to get hooked.
 - Try distancing the emotional intensity.
 - If the person moves to a critical/blaming/accusatory posture, use separator phrases like "That's one view" or "I see we don't agree on this."
4. Keep the spot light on the issue(s), rather than personalities.
 - Selectively ignore any statements aimed at your personally.
 - Continually shift the focus onto what the problem is, what the issues are, etc.
5. Try not to read more into what the person is saying than may be there.
 - For example, "Well, I would have gotten to it if you'd been here, " could just as easily mean that the person has come to rely on you rather than being an implication that you've been taking too much time off.
6. Respond only to positive parts of the discussion. Divert/redirect any negative inferences.
 - For example, to a statement like...
"Well, I would have brought this up sooner, but you're so defensive about these things."
Respond with:
"What leads you to think I would be defensive about this?"
Rather than:
"Well, I'm not the only one who is defensive! What about the time that you..."
7. If you're in the wrong, apologize.
 - Do so with sincerity.
 - Avoid conveying any sarcastic undertones.
 - An apology goes a long way toward diffusing anger.
8. Avoid the temptation of complaining to someone else rather than the person you should be confronting.
 - Things have a way of getting back to people and backfiring.
 - Say what you need to say directly to the person who needs to hear it.
 - If need be, plan out and practice how you will do this, then do it.
9. If need be, buy time.
 - Try to move to a proactive rather than reactive stance. When we are in a reactive stance, we think "off the top of our head" and often regret what we said later.
 - Get time to think, to get your feelings under control, to decide on your response. For example, to buy time say...
"I need time to think about this."
"I need to think through what you just said."
"I'd like to get back to you about this. I'd rather not respond right now."
"Could you give me an example?"

10. If you decide to be directly confrontational, weight the risks carefully.
 - Is it worth it?
 - What are the trade offs?
 - What might you lose/gain?
 - Can the person handle it?
 - Are you prepared for how they might respond?

11. Identify your expectations. Decide what you want.
 - What's your best hope and worst fear for the outcome?
 - How realistic is this?
 - What can you stop or start doing to increase the likelihood of getting what you want?

12. Consider the timing.
 - If you decide to confront someone, consider when and how to structure that conversation. For example.
 - When is the person likely to be more receptive?
 - Where can you meet to minimize interruptions?
 - If someone is confronting you and the timing is all wrong, tell them so. For example...
 - "Tom, I would really like to talk with you about this, but right now is not a good time. How about tomorrow afternoon?"

13. Staff off the defensive.
 - Once you begin to react defensively, you run the risk of losing control of the situation and decrease the likelihood of a productive resolution.
 - The emphasis then shifts to your defensive behavior and away from the original reason for the discussion.

14. Ask for and give feedback.
 - Identify what you might need (information, support, resources) to be able to be more responsive.
 - Offer the opportunity for the other person to give you feedback.

15. Become a broken record.
 - Sometimes something has to be said several times before the person actually hears it, particularly if it is not what they want to hear.
 - If you do not feel the person has gotten the message, focus on what you want to convey and keep working it into the discussion.
 - Try to get the person to restate back to you or at least acknowledge that they heard what you said before you move to another issue.

16. If you think the person is playing games, call them on it and stop talking.
 - Make a statement like...
 - "You asked me for my opinion on this. So far, every idea I've given you you've given a 'yes, but...' ... and wait for a response.

17. Ask for a ceasefire.
- If the person has not relented or seems to be escalating their feeling level or behavior, attempt to get an agreement from them that they will calm down.
 - Make it clear that unless they do, you are not willing to continue talking with them. Stick to your guns about this!
18. Close down shop.
- If you feel things are getting nowhere or find yourself getting angrier or more upset than you would like, use a close-off statement or action and stop the discussion. For example...
Keep silent and don't make any comeback statement.
Say "I can see both of us are still very frustrated, I need to take a break right now."
If you have to, just walk away.
19. Regroup. Be the first to make a comeback.
- Don't wait too long to follow up; things have a way of festering.
 - Attempt to start anew on a conciliatory note such as "I know that part of the reason we both got upset is because we both really care about..."
 - Try to identify mutual concerns, issues and build from there.
 - Help the other person; usually they have as much pride and are as regretful about what happened as you are.