Quest Integration presents

Creating Balance In The Service Plan: Bringing Important To & Important For Together

Wednesday August 9, 2017
9:00am to 11:00am HST

Featuring Bob Sattler
Since Our Last Session . . .

How Have You Used The Skills?
Important To
Important For &
The Balance Between

Everyday
Learning Skills

Management Skills

Donut
Matching

Learning Logs
Working Not Working

4 + 1 ?s

Communication
Reputation

2-Minute Drill

Good Day
Bad Day

Relationship
Routines & Rituals

Map

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A Preliminary Assessment Tells Us

- Carrie K. is a 35 year old realtor who suffered a spinal cord injury as a result of a motor vehicle accident 4 months ago. She spent the last 2 months at Rehabilitation Hospital of the Pacific and is ready for discharge to her home which she owns. This home is a 2 story walkup townhome with 14 stairs.

- Carrie’s mother, Kathy, who has been living with Carrie, will assist with Carrie’s care at night but also works 30 hrs/weeks as an office clerk at a nearby medical clinic.

- As a result of the spinal cord injury, Carrie is a quadriplegic with gross motor movements to her upper extremities. She has an electric wheelchair which she is able to mobilize via sip & puff. She is completely dependent on others for all ADLS including transfers, bathing, dressing, grooming, feeding and is diapered.

- While in rehab, Carrie started attending painting classes and is learning how to paint using her mouth. This has become her passion.
As Assessment Through A Person Centered Lens

• Carrie K. is a 35 year old realtor who has been living in Hawaii for 10 years. She lives with her dog, Starr and her mother, Kathy. She enjoys singing karaoke, going to church and spending time with her friend, Amy.

• She suffered a spinal cord injury as a result of a motor vehicle accident 4 months ago and has spent the last 2 months at Rehabilitation of the Pacific. She is ready for discharge to her home which she owns. This home is a 2 story walkup townhome with 14 stairs.

• Kathy will assist with Carrie’s care at night but also works 30 hrs/weeks as an office clerk at the a nearby medical clinic.

• As a result of the spinal cord injury, Carrie has a diagnosis of quadriplegia with gross motor movements to her upper extremities. She has an electric wheelchair which she is able to mobilize via sip & puff. She requires full assistance from others for all ADLS including transfers, bathing, dressing, grooming, eating and continence care.

• While in rehab, Carrie started attending painting classes and is learning how to paint using her mouth. This has become her passion.
Important To and For are Connected

• Important to and important for influence each other
• No one does anything that is “important for” them (willingly) unless a piece of it is “important” to them

Balance is dynamic (changing) and always involves tradeoffs:

– Among the things that are “important to”;
– Between important to and for
CMS says that

Person Centered Planning

• Is directed by the person and the people they choose.

• Results in a person-centered plan that reflects goals and preferences regarding:
  - things to do and places to go,
  - employment,
  - income and savings,
  - health care and wellness,
  - education, and
  - others.

• Reflect services and supports (paid and unpaid), who provides them and whether an individual chooses to self-direct services.
CMS says the plan will:

- Assist the person in achieving personally defined outcomes in the most integrated community setting,
- ensure delivery of services in a manner that reflects personal preferences and choices, and
- contribute to the assurance of health and welfare.

And that it:

- Reflects cultural considerations
- Uses plain language
- Includes strategies for solving disagreement
- Offers choices to the person regarding services and supports the person receives and from whom
- Provides a method to request updates

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And

Identifies:
-the strengths,
-preferences,
-needs (clinical and support), and
-desired outcomes of the individual

The plan also includes risk factors and plans to minimize them
In short a support system that helps the person make informed choices that results in a life of their choosing in their communities.
Moving from Service Life to Community Life

Service Life

- ‘Important for’ addressed
- No organized effort to address ‘important to’

A Good Paid Life

- ‘To’ and ‘for’ present
- Closest people are paid or family
- Few real connections

Community Life

- ‘To’ and ‘for’ present
- Active circle of support
- Included in community life

Focus on connecting, building relationships and natural supports

‘Important to’ recognized

‘Important to’ present

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Impact of Planning & Decision Making On Life Trajectory

PERSON’S VISION FOR A FULL LIFE IN THE COMMUNITY

LIFE DEFINED BY DISABILITY

Integration of LifeCourse Life Trajectory© and Person Centered Thinking©

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A Helpful Way to Identify Goals

**VISION for a GOOD LIFE**
- To be a peer counselor to women with spinal cord injuries
- To have a full life and be connected to others
- To pursue my passion in the arts

**What I DON’T WANT**
- To be stuck at home or in a nursing home
- To not be productive

**Life Trajectory Worksheet: Individual**

Everyone wants a good life. The bubbles on the right will help you think about what a good life means for you or your family member, and identifying what you know you don’t want. You can use the space around the arrows to think about current or needed life experiences that help point you in the direction of your good life.

- To be a peer counselor to women with spinal cord injuries
- To have a full life and be connected to others
- To pursue my passion in the arts

- To be stuck at home or in a nursing home
- To not be productive

- To volunteer to get experience as a peer counselor
- To stay involved in my church – get involved with the choir
- To do as much as I can for myself
- To go to painting classes
- To not do anything for myself
- To be wasting away at home
- To be doing nothing for myself
- To be in a nursing home
- To be a peer counselor to women with spinal cord injuries
- To have a full life and be connected to others
- To pursue my passion in the arts

**CHARTING the life course**
A service or support is NOT an outcome!

Examples that are *NOT* outcome statements:

- I want a day program.
- I want to go to physical therapy.
- I want speech therapy.
- I want to be in the workshop.
Considerations for Developing the Service Plan

• Support to maintain health
• Support for ADLS
• Support for Starr (Carrie’s dog)
• Support to attend church
• Support to go to karaoke
• Support to paint
Identifying Resources

- Resources are not just what the system provides (i.e. HCBS services)
- Are there personal assets/strengths?
- What relationships are available?
- Can technology provide assistance?
- What community opportunities exist?
# Available Resources

<table>
<thead>
<tr>
<th>Personal Strengths/Assets</th>
<th>Relationships</th>
<th>Technology</th>
<th>Community Based</th>
<th>Eligibility Specific</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outgoing</td>
<td>Kathy (mom)</td>
<td>Sip-n-puff electric wheelchair</td>
<td>St. Catherine’s church</td>
<td>HCBS</td>
</tr>
<tr>
<td>Fearless</td>
<td>Amy (friend)</td>
<td>iPhone</td>
<td>Karaoke clubs</td>
<td>Voc Rehab</td>
</tr>
<tr>
<td>Forgiving</td>
<td>Starr (dog)</td>
<td>Bluetooth</td>
<td>Movie theater</td>
<td>Paratransit</td>
</tr>
<tr>
<td>Social</td>
<td>2 sisters</td>
<td>Computer</td>
<td>Painting studios</td>
<td></td>
</tr>
<tr>
<td>Strong faith</td>
<td></td>
<td>CamelBak</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Likes a challenge</td>
<td></td>
<td>Life Alert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funny</td>
<td></td>
<td>Repositioning mattress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Artistic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>helpful</td>
<td></td>
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</tbody>
</table>
## Daily Schedule

<table>
<thead>
<tr>
<th>TIME</th>
<th>MON</th>
<th>TUES</th>
<th>WED</th>
<th>THURS</th>
<th>FRI</th>
<th>SAT</th>
<th>SUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:30-7 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7:30-8 AM</td>
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<td></td>
</tr>
<tr>
<td>8:30-9 AM</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>9:00-10 AM</td>
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<td></td>
</tr>
<tr>
<td>10:00-11 AM</td>
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<td>11:00-12 AM</td>
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<td></td>
</tr>
<tr>
<td>12:00-1 PM</td>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td>1:00-2 PM</td>
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<td></td>
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<td></td>
<td></td>
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<tr>
<td>2:00-3 PM</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:00-4 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>4:00-5 PM</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5:00-6 PM</td>
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<td></td>
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<tr>
<td>6:00-7 PM</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7:00-8 PM</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>8:00-9 PM</td>
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<td></td>
</tr>
<tr>
<td>9:00-10 PM</td>
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<td></td>
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<tr>
<td>10 PM-11 PM</td>
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<td></td>
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</tbody>
</table>

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Sample of an Integrated Daily Schedule

<table>
<thead>
<tr>
<th>TIME</th>
<th>MON</th>
<th>TUES</th>
<th>WED</th>
<th>THURS</th>
<th>FRI</th>
<th>SAT</th>
<th>SUN</th>
</tr>
</thead>
<tbody>
<tr>
<td>6:30-7 AM</td>
<td>Breakfast</td>
<td>Breakfast</td>
<td>Breakfast</td>
<td>Breakfast</td>
<td>Breakfast</td>
<td></td>
<td>Spend</td>
</tr>
<tr>
<td>7:30-8 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8:30-9 AM</td>
<td></td>
<td>Volunteer</td>
<td>Volunteer</td>
<td>Workout</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9:30-10 AM</td>
<td></td>
<td>Fire Station</td>
<td>Fire Station</td>
<td>@ Gym</td>
<td>&amp; go to IHD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00-11 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Church @</td>
</tr>
<tr>
<td>11:00-12 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>St Ann’s</td>
</tr>
<tr>
<td>12:00-1 PM</td>
<td>Lunch with</td>
<td>Lunch with</td>
<td>Lunch with</td>
<td>Lunch @</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:30-1 PM</td>
<td>PCA help</td>
<td>Firemen @</td>
<td>WorkOut</td>
<td>PCA help</td>
<td>Crown Ctr</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:00-2 PM</td>
<td></td>
<td>Library</td>
<td>El Maguey</td>
<td>@ Gym</td>
<td>Wal-Mart</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:30-3 PM</td>
<td>Watch TV</td>
<td>Watch TV</td>
<td></td>
<td>&amp; chill for game</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:00-3 PM</td>
<td></td>
<td>Football</td>
<td>Football</td>
<td>Football</td>
<td>Football</td>
<td>Football</td>
<td>Tigers</td>
</tr>
<tr>
<td>3:00-4 PM</td>
<td></td>
<td>Practice</td>
<td>Practice</td>
<td>Practice</td>
<td>Practice</td>
<td>Practice</td>
<td></td>
</tr>
<tr>
<td>3:30-4 PM</td>
<td></td>
<td>Football</td>
<td></td>
<td>Football</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4:00-5 PM</td>
<td></td>
<td>Game</td>
<td></td>
<td>Football</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5:00-6 PM</td>
<td></td>
<td></td>
<td></td>
<td>Dinner with</td>
<td>Matt (twin)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6:00-7 PM</td>
<td></td>
<td></td>
<td></td>
<td>McDonalds</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6:30-7 PM</td>
<td></td>
<td></td>
<td></td>
<td>Music</td>
<td>PayPerView</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7:00-8 PM</td>
<td></td>
<td>Lawson</td>
<td>Northland</td>
<td>I-pad while</td>
<td>I-pad while</td>
<td>with Matt</td>
<td>Firemen</td>
</tr>
<tr>
<td>7:30-8 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8:00-9 PM</td>
<td></td>
<td>Mom walks</td>
<td>Mom walks</td>
<td>Therapeutic</td>
<td>Mom walks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8:30-9 PM</td>
<td></td>
<td>Horseback</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9:00-10 PM</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00-11 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Carrie’s One Page Description

What People Like and Admire about ME

- Outgoing
- Enjoys being around people
- Likes to make others laugh
- Listening ear
- Forgiving
- Fearless
- Likes challenges

What is important to ME

- Looking neat and clean
- Casual clothes - shorts and a nice T-shirt
- Prevent bed sores
- Consistent and reliable caregivers
- Attend painting classes
- Go out with her friend, Amy

My Support Needs to be Happy, Healthy, and Safe

- Total assist with bathing, grooming, feeding, wheelchair transfers
- Uses electric wheelchair with sip & puff for independent mobility
- Needs assist with weight shifting for pressure relief while in wheelchair and turning every 2-3 hours to prevent bed sores when in bed
- Needs help to drink 8 or more cups of liquids daily due to a history of urinary tract infections
- Strict bowel routine every day
- Daily range of motion exercises to prevent stiffness to arms and legs
- Blow dry hair after shampoo and floss teeth after each meal

Picture of My Life

- Accessibility in/out of home since home is a second story walk up town house with 14 stairs; needs assistive device
- Mother to reside in home and assist with care as long as she can
- Stylish home
- Become artist
Carrie’s One Page Description

My Support Needs to be Happy, Healthy, and Safe

• Total assist with bathing, grooming, feeding, wheelchair transfers
• Uses electric wheelchair with sip & puff for independent mobility
• Needs assist with weight shifting for pressure relief while in wheelchair and turning every 2-3 hours to prevent bed sores when in bed
• Needs help to drink 8 or more cups of liquids daily due to a history of urinary tract infections
• Strict bowel routine every day
• Daily range of motion exercises to prevent stiffness to arms and legs
• Blow dry hair after shampoo and floss teeth after each meal
### Putting The Service Plan Together

<table>
<thead>
<tr>
<th>#</th>
<th>Start Date</th>
<th>Modified Date</th>
<th>My Needs, Risks, Issues</th>
<th>My Goals</th>
<th>My Outcomes (include timeframes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>6/30/17</td>
<td>NA</td>
<td>I love painting and would like to get better at it.</td>
<td>I will receive the help I need to attend painting classes.</td>
<td>I will be able to attend painting classes 2x/week for the next 3 months.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priority</th>
<th>My Actions</th>
<th>Barriers</th>
<th>Who Will Help Me</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I will contact Rehab of the Pacific to schedule the painting classes.</td>
<td>none</td>
<td>Carrie</td>
</tr>
<tr>
<td>2</td>
<td>I will contact Susan (service coordinator) with the start date of my painting class since I will need personal care worker to accompany me to the class. During class, a personal care worker will help reposition me and help me with drinking water.</td>
<td>availability of a worker</td>
<td>Aloha Caregivers.</td>
</tr>
</tbody>
</table>
# Putting The Service Plan Together

<table>
<thead>
<tr>
<th>#</th>
<th>Start Date</th>
<th>Modified Date</th>
<th>My Needs, Risks, Issues</th>
<th>My Goals</th>
<th>My Outcomes (Include timeframes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>6/30/17</td>
<td>NA</td>
<td>I would like to volunteer as a peer counselor for young women with spinal cord injuries.</td>
<td>I will receive the training I need to be a peer counselor.</td>
<td>Will obtain more information on the training program and other requirements to be a peer counselor within 3 months.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priority</th>
<th>My Actions</th>
<th>Barriers</th>
<th>Who Will Help Me</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I will contact Rehab of the Pacific for information on the training needed to volunteer as a peer counselor there.</td>
<td>May not have qualifications to be peer counselor</td>
<td>Carrie</td>
</tr>
</tbody>
</table>
## Putting The Service Plan Together

<table>
<thead>
<tr>
<th>#</th>
<th>Start Date</th>
<th>Modified Date</th>
<th>My Needs, Risks, Issues</th>
<th>My Goals</th>
<th>My Outcomes (include timeframes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>6/30/17</td>
<td>NA</td>
<td>I would like to attend my church located one block away on Sunday.</td>
<td>I will receive the help I need to attend church on Sundays.</td>
<td>I will attend church every Sunday over the next 3 months.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priority</th>
<th>My Actions</th>
<th>Barriers</th>
<th>Who Will Help Me</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Personal care worker will accompany me to church to help reposition me and help me with drinking water.</td>
<td>Worker availability</td>
<td>Aloha Caregivers</td>
</tr>
</tbody>
</table>
Thanks for helping us continue to develop plans that better support our members!
For Further Information

• Support Development Associates
  – Bob Sattler
  • bob@sdaus.com
  • 303.870.3903