

## TRAINING GUIDELINES

Person-centered planning is both mandatory and value-based. This training is designed to help planners to strike the delicate balance between doing what is required, and being creative and flexible enough to meet the needs of each individual consumer. For many, this will require rethinking their role in the service delivery system and their approach to services and supports.

The training outlined in this section provides hands-on experience in person-centered planning for all those involved, including: consumers, families, service coordinators, service providers, and advocates. Anyone who is involved in the development of person-centered IPPs should be included in this training. Training should be scheduled in places that are easily accessible and at times that allow for the full participation of everyone.

Facilitators, interpreters, and translators may be necessary to ensure that everyone who wants to participate is able to. Those facilitators, interpreters, and translators who will be directly involved in the person-centered IPP process should attend this training, so that they have an appropriate frame of reference while working with consumers and families. Facilitators, interpreters, and translators should also have basic training in developmental disabilities so that they are familiar with the necessary concepts and vocabulary.

These training guidelines are to be used by the teams of instructors who train those involved in person-centered IPPs. The teams of trainers who conduct this training should reflect the diversity in lifestyle, language, and culture of the groups they are training. The emphasis of the training is on exercises that give experience in person-centered planning. Lecture is kept to a minimum.

## **Training Objectives**

The objectives of this training are to expose participants to:

- person-centered planning values
- a variety of person-centered planning practices
- the requirements related to person-centered planning in the Lanterman Developmental Disabilities Services Act<sup>11</sup>
- a structured opportunity to apply the values and requirements related to person-centered planning in the California developmental service and support system.

## **Training Description**

This training is conducted as a workshop. The minimum duration for this workshop is one day. The times seen in *italics* under the title of each exercise are the suggested times and durations of the exercises for a one-day workshop. Participants in this workshop will engage in discussion and simulated planning exercises. Participants are arranged in teams of 3-7 members for the simulated planning exercises. Instruction is given by a team consisting of at least one consumer or family member and one person with service coordination experience.

## **Training Methods**

Simulated planning sessions are conducted in stages, with discussion between each stage. Participants are expected to gain hands-on experience in person-centered planning by participating in these simulations. Discussions will cover a variety of topics from how to help consumers make meaningful choices in their lives to barriers to achieving

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1. Welfare & Institutions Code Sections 4500, et seq.

the goals and objectives selected at the planning conference. The team discussions result in notes which are compiled into a written IPP by the end of the session.

### **Training Materials**

Each team is provided with an IPP Resource Manual and a presentation easel for note-taking. These teams will also be provided with examples of person-centered planning for the simulation exercises. Each participant is provided with a personal guide to person-centered IPPs. Sample forms and checklists will also be available.

### **Evaluation Methods**

Evaluation is done by groups. If a group engages in productive discussion, completes each exercise, and submits the results of these discussions in the form of a written IPP, the group will have met the objectives of the workshop.

### **Exercise 1 – Introductions**

*8:00 AM-8:30 AM*

Participants enter the training room, fill out the registration forms, and are seated at tables in groups of 3-7. Instructors distribute copies of the Resource Manual and other training materials and introduce themselves. The workshop objectives are reviewed along with general guidelines for discussion. Break times and location of facilities are discussed.

Participants introduce themselves, giving their names, and their usual roles in developing IPPs. Participants are also asked to discuss their expectations of the workshop. These expectations will be recorded and referred to at the end of the workshop.

The instructors review introduction, values, and instruction sections of the Resource Manual. Questions and comments are solicited after each major heading within the sections being reviewed.

**Exercise 2 - Person-centered planning values and roles**

*8:30 AM-9:30 AM*

The instructors introduce the concepts of person-centered planning by paraphrasing Section 1 of the Resource Manual. Then the instructors review the values and roles from Section 2 of the Resource Manual. Instructors illustrate these values and roles with examples as they review. Instructors solicit questions and comments after presenting each value statement and role.

**Exercise 3 - IPP requirements**

*9:30 AM-10:00 AM*

The instructors do a brief review of the required format and instructions for person-centered IPPs from Section 3 of the Resource Manual. Each major heading is discussed briefly with some time provided for questions and comments. The instructors emphasize that this is an introduction to the requirements, and that future exercises will give the participants experience in applying the requirements.

**Morning Break**

*10:00 AM-10:15 AM*

**Exercise 4 - Introduction to person-centered planning methods**

*10:15 AM-11:15 AM*

The instructors review the examples of person-centered planning methods found in Section 4 of the Resource Manual. Participants are

encouraged to discuss these methods, and relate them to the methods they currently use. The instructors will guide a discussion of the similarities and differences between current practices and person-centered planning.

Instructors then review some of the stories illustrating different aspects of person-centered planning found in Section 5 of the Resource Manual. Participants are then asked to relate some of their own experiences in developing IPPs and how those experiences relate to the values and methods of person-centered planning.

### **Exercise 5 - Developing a person-centered planning team**

*11:15 AM-Noon*

Each participant in a discussion group will assume a role for the simulation exercises. The roles include:

- the consumer who is the focus of the planning effort
- the service coordinator
- one or more family members (or an authorized representative)
- a friend or neighbor
- a provider of services or supports
- an advocate

The instructors will provide a range of examples from which groups can choose for their simulations. These examples will provide a brief description of a consumer with a cursory history and description of the current situation. Each discussion group will choose an example, and use it to develop complete roles for the simulation. The groups will be encouraged to expand on these examples to meet the needs of the training exercises.

**Lunch Hour**

*Noon-1:00 PM*

**Exercise 6 - Developing a person-centered IPP**

*1:00 PM-3.00 PM*

Instructors will review Section 3 of the Resource Manual regarding the development of person-centered IPPs. Participants will conduct a simulated planning conference based on the examples they have chosen and the instructions in Section 3. Instructors will circulate from group to group to provide assistance as needed.

**Afternoon Break**

*3:00 PM-3:15 PM*

**Exercise 7 - Summary and evaluation**

*3:15 PM-5:00 PM*

Each group will present a summary of the simulated conference it has just completed. The instructors will guide these discussions and provide time for a group summary at the end. A written evaluation of the training will be completed by each participant.