




RECOVERY WORKFORCE SUMMIT
2014 Annual Conference

Person-Centered Planning:
Previewing an Innovative Multimedia Training Tool

BALTIMORE MARYLAND **JUNE 22-25**


PRA Psychiatric Rehabilitation Association
Growing and Training the Recovery Workforce



Introductions

- Wayne Centrone, Center for Social Innovation
 - Introduction and need for innovative, multi-media training tools
- Bill Gillstrap, Bluebonnet Trails Community Services, Texas
 - What is PCR? How is it different? How Recovery Roadmap can be used to support "pre-planning"
- Janis Tondora, Yale Program for Recovery and Community Health
 - How to honor the person and satisfy the chart? How Recovery Roadmap supports person-centered documentation

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First... Why Are We Here?

Recovery Roadmap

The Impact of Person-Centered Recovery Planning

This video describes the positive impact that PCR has on a person in recovery and the effect that the support of the PCR team has on outcomes for a person in recovery.



The Impact of PCR

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PROVIDER > Section 1 > The Impact of PCR Slide 13 of 84 [back icon] [next icon]

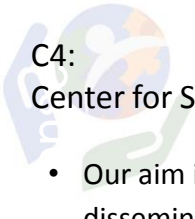


Recovery Roadmap Background & Context



- **Thanks** to NIH and NIMH
- **Partnership** between academia and small business with support from community partners
- **Recovery Roadmap:** 2 tools in 1
- **Story:** How did PCRP become the “Recovery Roadmap?”



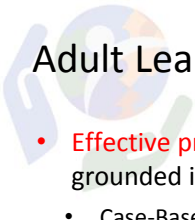


C4: Center for Social Innovation



- Our aim is to identify and disseminate best practices to the workforce serving individuals who may be marginalized or vulnerable





Adult Learning



- **Effective professional development** is grounded in adult learning principles
 - Case-Based/Inquiry-Based Learning
 - Universal Design for Learning
 - Communities of Practice





From Knowledge to Skills to Implementation



- In addition to building knowledge, professional development should enhance **SKILLS** and support the **IMPLEMENTATION** of best practices



A Core Dilemma



- In the months after training, knowledge and skills decrease.
 –Use it or lose it...



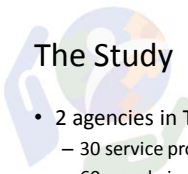




The Tool



- Two versions: one for service providers and one for people in recovery
- Video testimonials
- Video case study
- Activities that can be printed or emailed
- Interactive elements



The Study



- 2 agencies in Texas
 - 30 service providers
 - 60 people in recovery (2 per service provider)
- **April:** Baseline survey
- **May:** Use tool
- **May:** Post-survey
- **June:** Site visits with interviews and focus groups
- **August:** 3 month follow-up survey





Tell Us About YOUR Experience

- What types of things make your personal “top three?”
- Is this what YOUR treatment plan is all about?
 - Or is it what the treatment plans you write are about?
- If not, what types of goals typically ARE on your plans?

Person-Centered Planning is about making sure what ends up on the plan is important to the person!



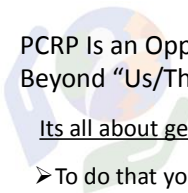
What we hope for THEM...

- ✓ Compliance with treatment
- ✓ Decreased symptoms/Clinical stability
- ✓ Better judgment
- ✓ Increased Insight...Accepts illness
- ✓ Follows team's recommendations
- ✓ Decreased hospitalization
- ✓ Abstinent
- ✓ Motivated
- ✓ Increased functioning
- ✓ Residential Stability
- ✓ Healthy relationships/socialization
- ✓ Use services regularly/engagement
- ✓ Cognitive functioning
- ✓ Realistic expectations
- ✓ Attends the job program/clubhouse, etc.

What we value for US...

- ✓ Life worth living
- ✓ A spiritual connection to God/others/self
- ✓ A real job, financial independence
- ✓ Being a good mom...dad...daughter
- ✓ Friends
- ✓ Fun
- ✓ Nature
- ✓ Music
- ✓ Pets
- ✓ A home to call my own
- ✓ Love...intimacy...sex
- ✓ Having hope for the future
- ✓ Joy
- ✓ Giving back...being needed
- ✓ Learning





PCRP Is an Opportunity to Move Beyond “Us/Them”

Its all about getting things put back on your list!

- To do that you must have a clear understanding of what is important to you
- Understand your strengths and barriers
- Identify supports to help you along
- Develop goals informed by your strengths, interests, hopes, dreams and supports



Person-Centered Recovery Planning (PCRP)



- Recognizes that Recovery is possible and that you are a person first!
- Realizes that you are the expert in your own recovery
- Helps you identify and connect with your hopes and dreams
- Helps you recognize your rights as a person receiving services in the mental health system



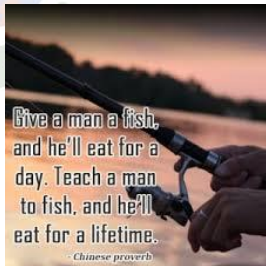
PCRP



- Helps identify and prioritize life goals
- Identifies and focuses on your strengths
- Helps you identify your support system
- Holds your treatment and cultural preferences in high regard
- Encourages community connections
- Empowers and allows a person to be in charge of and make decisions for their life and future



Why is PCRP Important?





PCR: How is it different?



Recovery Roadmap

Traditional

- Independence and community activities come after someone is clinically stable.
- Following providers' instructions is valued.
- Professionals hold the information (e.g., plans, assessments, records).
- Problems (the "problem list") drive treatment.
- Outcomes focus on clinical stability (e.g., fewer symptoms, fewer hospital stays).
- Focus on professional services (e.g., medications, therapy, case management).
- Treatment often happens in formal treatment settings; only mental health professionals are listed in the treatment plan.
- Priority on keeping the person safe and doing what is in the "best interest" of their safety and stability.

Person-Centered

- Independence and involvement in the community are viewed as end goals and are supported in clinical treatment.
- Active participation and empowerment of the person is strongly encouraged.
- All team members have access to information to increase collaboration.
- Interests, abilities, and personal choices are key in the recovery plan. Focus is on the person's goals.
- Outcomes also include quality of life and recovery areas (e.g., employment, stable housing, greater control over their treatment and life).
- Many different supports are valued and included (e.g., faith-based supports, peer support, supported rehabilitatives).
- A range of settings and natural supports are valued and part of the treatment plan.
- Safety remains a priority, but people are supported in trying new things. Responsible risk taking is seen as a natural part of growth and recovery.

PERSON IN RECOVERY > Section 1 > Traditional v. Person-Centered Practices Slide 13 of 48

Roadmap Demo:
Traditional vs. Person Centered



Recovery Roadmap

Activity: Traditional versus Person-Centered Practices
Click on the items below to learn if they are person-centered or traditional practices

People are expected to get well and manage their mental health problems before they can decide to go back to school or work.	Empowerment and active participation of the person in recovery is valued.	Providers work in a collaborative and give-and-take relationship with the person receiving services.
Avoidance of all forms of risk - protection of person and community is the dominant focus.	Your strengths are part of the plan and the way the plan is written feels respectful.	The plan is written by professionals, but you are expected to follow it.
What is important to you - your culture and values - are part of the plan.	There is a strict separation between staff/client in roles and in the amount of power each holds.	There is a focus on activities happening outside of the mental health center - not just mental health services.

The Recovery Roadmap Prepares the Person in Recovery In Advance



- Helps us to understand and prepare for an upcoming PCR by helping to identify:
 - Personal strengths
 - Life goals – both short and long term
 - Natural and professional supports
- Users complete the Roadmap exercises as it relates to their OWN personal recovery journey
- For the sake of today's presentation, we will demo a few sections using the story of "Julie"

Roadmap Engages the Learner Through Stories and Examples



Recovery Roadmap

Meet Julie

Julie is a 54-year-old white woman who grew up and currently lives in Boston, MA. She is a loving mother and grandmother. When her children were young, Julie relied heavily on her sister Beverly to provide care and support because she was struggling with symptoms of bipolar disorder, post-traumatic stress disorder (PTSD), and addiction. Much of that time, Julie and her children lived with Beverly in the home that Beverly owned. Her adult children are now married and have children of their own.

Beverly recently passed away, and Julie has had trouble taking care of herself. Over the past two years, she has started to use alcohol regularly, and symptoms of PTSD and bipolar disorder have been

very disruptive, leading to multiple trips to the emergency room. During one of her trips to the hospital, Julie was offered, and agreed to participate in, outpatient services from the Metro Community Support Program (CSP) so she could begin to feel better and manage her life and recovery.

Julie feels very sad about her current strained relationships with her children and grandchildren and wants to have a meaningful role in their lives. While her family maintains some phone contact, her children no longer allow visits or dinners in her home, due to feeling upset over Julie's continued drinking and their feeling that she is not taking care of herself or her mental health.

Julie has been living in her own apartment for 18 months, and for most of that time she has been overwhelmed by symptoms of mental illness and addiction. The loss of her sister, her greatest support, has left her feeling vulnerable, without a home, and disconnected from the people who are most important to her.

PERSON IN RECOVERY > Section 2 > Meet Julie

Slide 21 of 68

Roadmap Demo: Creating a Strengths Profile



Recovery Roadmap

My Strengths

Instructions:
Think about some of your strengths and type them into the spaces on the right. You do not have to fill in each space, but spend some time thinking these through. Submit your responses to either print and bring to your PCRP meeting, or email to your provider.

Examples of strengths:

- I am a hard worker.
- I communicate well.
- I have a good relationship with my peer support specialist.
- My faith and spirituality get me through tough times.
- I love my children and take good care of them.
- I am good at sports.
- I enjoy reading and writing poetry.
- My friends tell me that I am a good listener.

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submit

PERSON IN RECOVERY > Section 2 > My Strengths

Slide 27 of 68

Hopes, Dreams, and Goals

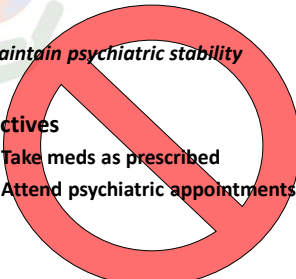


- Our hopes and dreams are important and help us to shape our goals.
- Dream BIG, figure out what is important to you and then break your "big" goal down into steps
- Setting and prioritizing your life goals will give you direction and purpose



And not just...

- **Goal**
 - **Maintain psychiatric stability**
- **Objectives**
 1. **Take meds as prescribed**
 2. **Attend psychiatric appointments**



31

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Roadmap Demo: Setting & Prioritizing Goals



Recovery Roadmap

Setting and Prioritizing My Goals

Instructions:
Type your goals into the boxes on the right. You do not have to fill in every space. It is perfectly okay to have just one really valued recovery goal!

Once you have finished typing, prioritize your goals by reordering the boxes. Click and hold one of the arrows on the right-hand side of a field, and drag it to where you would like it to be positioned. Then, submit your responses to either print or email.

submit

PERSON IN RECOVERY > Section 2 > Setting and Prioritizing Goals Slide 37 of 68

Natural Supports: Building your Team



- Being connected and having a support system is important in life and in navigating your recovery.
 - This can include natural supporters (e.g., family members, friends, co-workers) as well as service providers
- The Roadmap helps users to organize and identify who is in their life, how they are connected, and whether or not there might be benefit to inviting them to be part of the PCRP Team



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Roadmap Demo: Build Your Recovery Team



Recovery Roadmap

Picking My Team

Think about people who can support you and consider the roles these different team members may play. For example, you may want to invite your boss because she has been supportive of your recovery, and you are focused on moving from part-time to full-time work. Enter the names of people you would like to be on your recovery team to the right. You do not have to fill all the spaces! You can print or email this page to share with your team at your PCRP meeting.

NOTE: For your PCRP meeting, you should now have a printed copy of your strengths, goals, and a list of your support team.

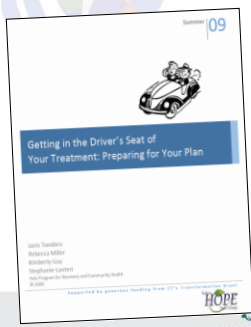
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PERSON IN RECOVERY > Section 2 > Picking My Team

Slide 42 of 68

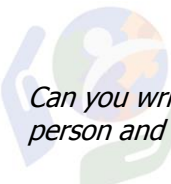


Where/How Tools like Recovery Roadmap Might be Used In the Field



- Experiences with the toolkit in Texas
 - Destination Recovery
- Need for innovative tools and strategies to engage people in recovery
 - to be used/accessed independently and/or put in hands of peer specialists

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Can you write a plan that honors the person and satisfies the chart?



Regulations
Required Paperwork
Medical Necessity
Compliance

Collaborative
Person-Centered
Strengths-based
Transparent

The Tensions of Serving Two Masters

HOPE Psychiatric Rehabilitation Association Growing and Training the Recovery Workforce



Irreconcilable differences? Happily ever after? (or at least a peaceful co-existence?)



"Let's face it: Our relationship is doomed!"

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A More Hopeful Proposition...

- We can balance person-centered approaches with medical necessity/regulations in creative ways to move forward in partnership with persons in recovery.
- We can create a plan that honors the person and satisfies the chart!
- In other words: PCRP is not soft!



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GOAL
as defined by person

Strengths/Assets to Draw Upon

Barriers /Assessed Needs That Interfere

Short-Term Objective
•Behavioral
•Achievable
•Measurable

Interventions/Methods/Action Steps
•Professional/"billable" services
•Clinical & rehabilitation
•Action steps by person in recovery
•Roles/actions by natural supporters

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Recovery Roadmap

On the previous page, you completed an activity where you reflected on Julie's story and created some person-centered goals for her. Here are some examples of person-centered goals for Julie.

Potential goals for Julie:

- I want to be close with my children and grandchildren... have them visit me a lot.
- I need to be healthy so I can be there for the kids. I don't want to drop dead from a heart attack or stroke anytime soon.
- I used to be part of a book club. I'd like to become part of a group like that again.
- This apartment's gotten out of control. I want to have a home I can feel proud of.
- I'd like to go back to school, and finish college someday.

PROVIDER > Section 4 > Potential goals for Julie Slide 68 of 84

Recovery Roadmap

Roadmap Demo: Educate (Part I)

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Writing Meaningful and Measurable Objectives
Click below for guidelines on how to write objectives.

How ambitious or modest?	How can I meet all the technical criteria?	A common quality error
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PROVIDER > Section 4 > Meaningful and Measurable Objectives Slide 72 of 84

Recovery Roadmap

Roadmap Demo: Practice (Part II)

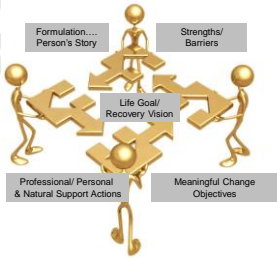
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How Would You Apply This to Julie's Story?
Click on examples of possible objectives that Julie might identify to reach her goals.

Goal: I want to be close with my children and grandchildren... have them visit me a lot.	Goal: I need to be healthy so I can be there for the kids. I don't want to drop dead from a heart attack or stroke anytime soon.	Goal: I used to be part of a book club. I'd like to become part of a group like that again.
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PROVIDER > Section 4 > Types of Interventions Slide 74 of 84

So how does this all come together in the recovery plan?



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The Roadmap embeds valuable resources and sample plans



Recovery Roadmap

Services & Action Steps

Now that you have reviewed the different parts of the PCR, you may wonder how all of the pieces come together in a good person-centered plan.

What does it look like? This next exercise will give you some tips for what to look for, using Goal #1 of Julie's plan.

Please take a few minutes to review Goal #1, found on page 3 of Julie's Integrated Summary and Plan.



[Download](#)

PERSON IN RECOVERY > After the Meeting > Services & Action Steps

Slide 44 of 68



Roadmap Demo: How to know a good PCP when you see one



Recovery Roadmap

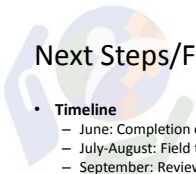
A Good Person-Centered Plan

Click below to see some of our thoughts on Julie's plan

<p>Why is Julie's goal of wanting to be close with her children and grandchildren a great goal for her PCR?</p>	<p>How does Julie's plan use some of her strengths, interests, and preferences?</p>	<p>Where does Julie's plan support her inclusion in the community with friends and family?</p>
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PERSON IN RECOVERY > After the Meeting > A Good Person-Centered Plan

Slide 45 of 68



Next Steps/Future Directions

- **Timeline**
 - June: Completion of Beta tool development
 - July-August: Field testing
 - September: Review data sets
 - September/October: Develop Phase II plan
- **Evaluation**
 - Small “n”
 - Proof of concept (prototype)
 - Inform the development of Phase II
- **Coordination of Phase II application**
 - NIMH SBIR
- **Things to Consider**
 - Access to Recovery Roadmap prototype



Discussion/Closing Q&A

