

# essential lifestyle planning and person centered thinking

handouts for a 1 day overview

Michael Smull  
&  
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A plan  
is not  
an outcome

## **The “old” conceptual framework for assessment and planning**

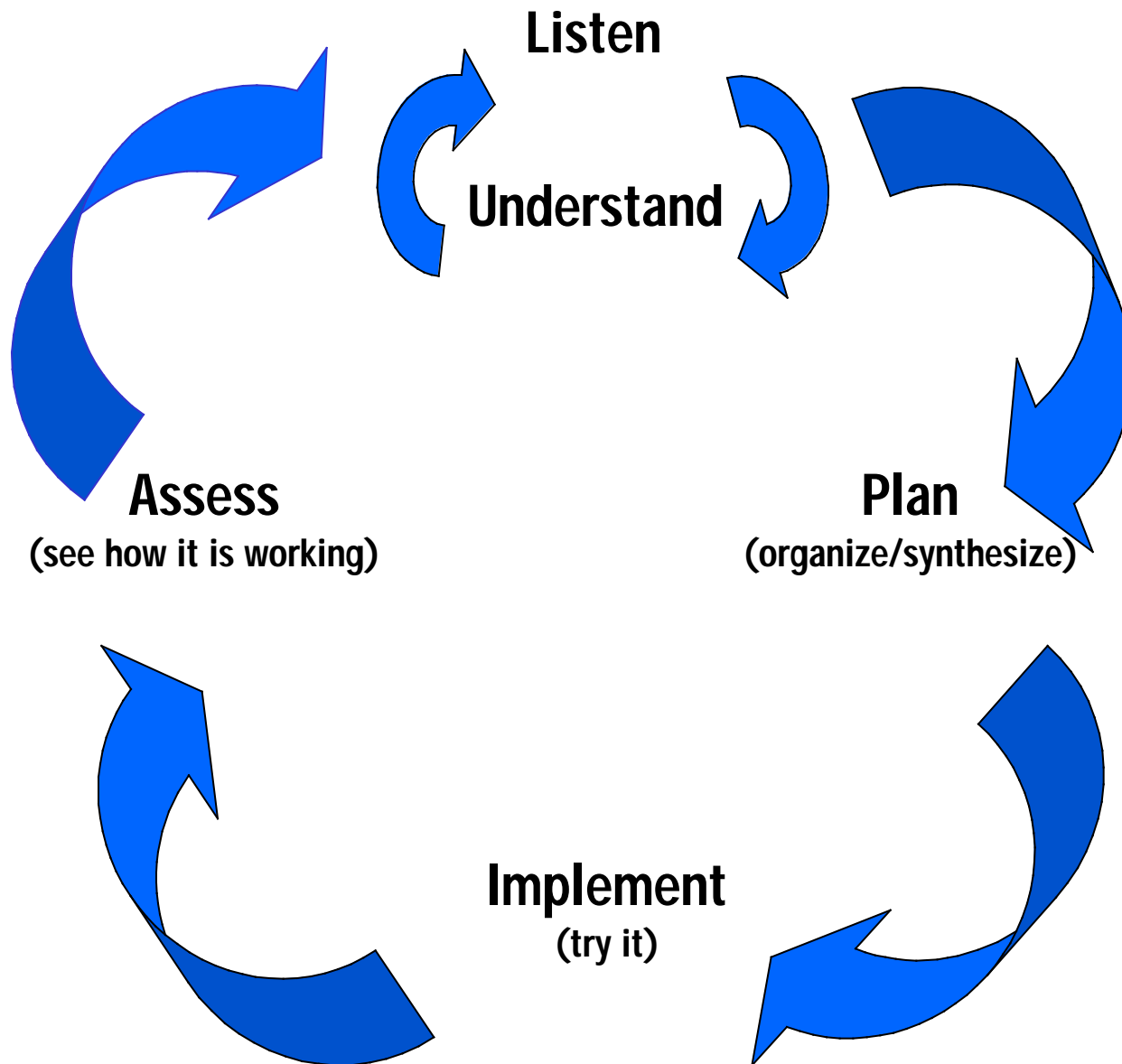
- Start with what is wrong with the person
  - Assess issues of health and safety
  - Determine what the person can and cannot do
  - Assessments of adaptive behavior
    - Strengths and needs list
- Plans that describe how to keep the person healthy and safe and that “make” them more independent

**Michael W. Smull June 2000**

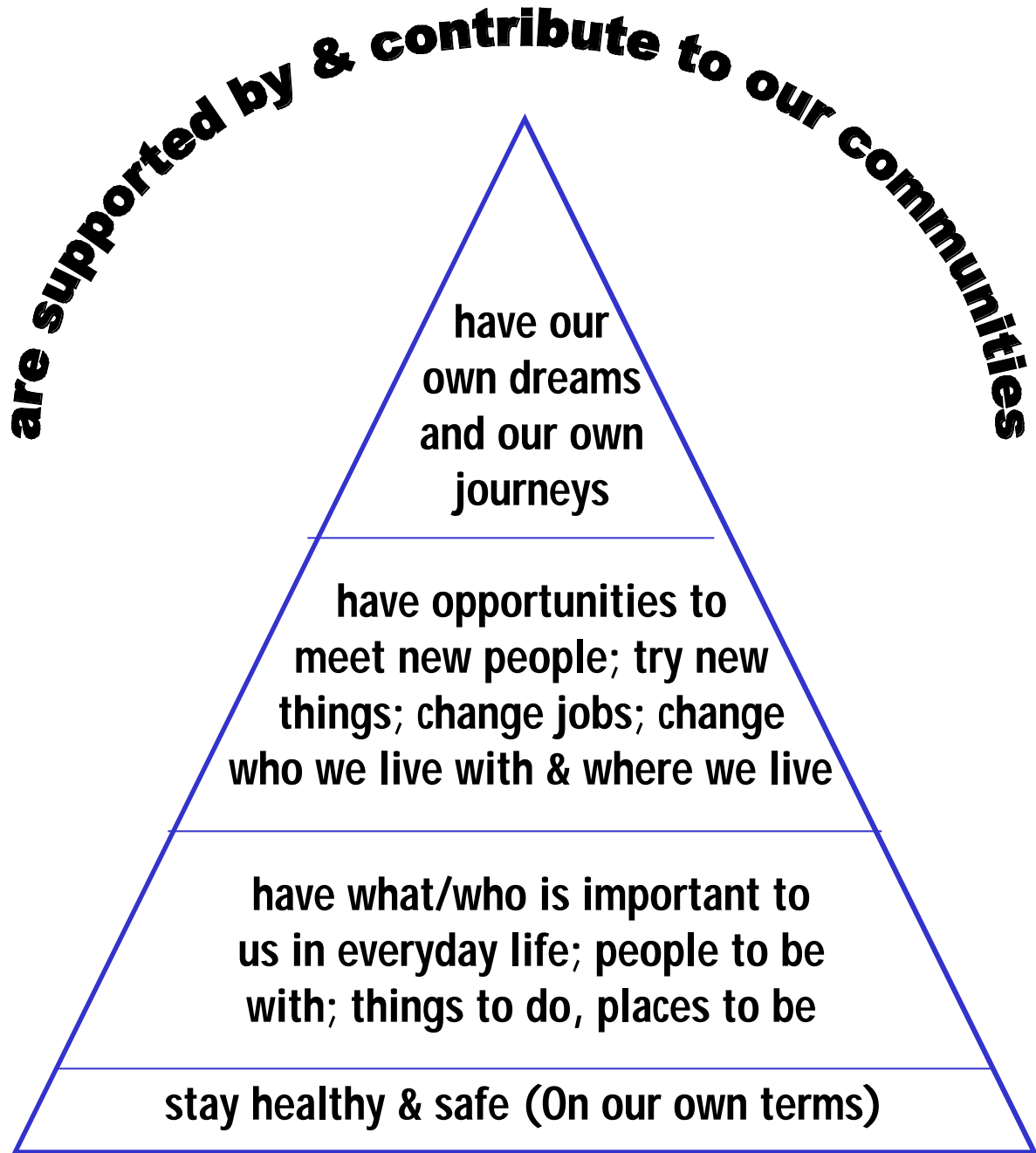
## **A new conceptual framework**

- Start with how the person wants to live
  - Learn what is important to the person in everyday life
  - Assess issues of health and safety
  - Assess what the person might want to learn to get more of what is important
- Plan with the person
  - Describe what is important to the person
  - Describe what others need to know or do to support the person
    - Addressing any issues of health or safety in the context of how the person wants to live
    - Offer opportunities for learning that help the person get more of what the person wants
- As the person gets more of what is important in everyday life –
  - Look for opportunities for the person to spend time in places and doing things where they are welcomed by the others there
  - As the person spends time where they are welcomed, look for opportunities to help establish and nurture relationships
  - Seek to discover what the person might like in the future and help them move in that direction

# Person Centered Planning - Learning Wheel



Each of us want lives where we:



(with apologies to Abraham Maslow)

Developed by Michael Smull, May 1996.



## Essential Lifestyle Planning is ...

- Finding out what is important to someone;
- Learning about what health, safety and risk means to the individual and those who know and care about him or her; and,
- Figuring out how someone can be supported in having a balance between happy and safe while making the best use of public dollars.




# **The process of developing a plan has 4 stages . . .**

- 1. Think about what you want to learn**
- 2. Gather the information**
- 3. Develop a first plan**
- 4. Record on-going learning and use  
what has been learned**

# Choice is about . . .

- Preference (things you like to do)
- Opportunity (to do those things)
- Control (of when, where and with whom those opportunities will occur)



	<b>Person</b> 		<b>Family</b> 		<b>Service Provider</b> 	
	<b>Happy</b>	<b>Safe</b>	<b>Happy</b>	<b>Safe</b>	<b>Happy</b>	<b>Safe</b>
<b>Preferences</b>						
<b>Opportunities</b>						
<b>Control</b>						

# Going from planning to action

## Learn/describe-

- what is important to and
- what is important for the person



## Explore what is conceivable -

- see what has been done elsewhere
- look for best options

## Make it happen -

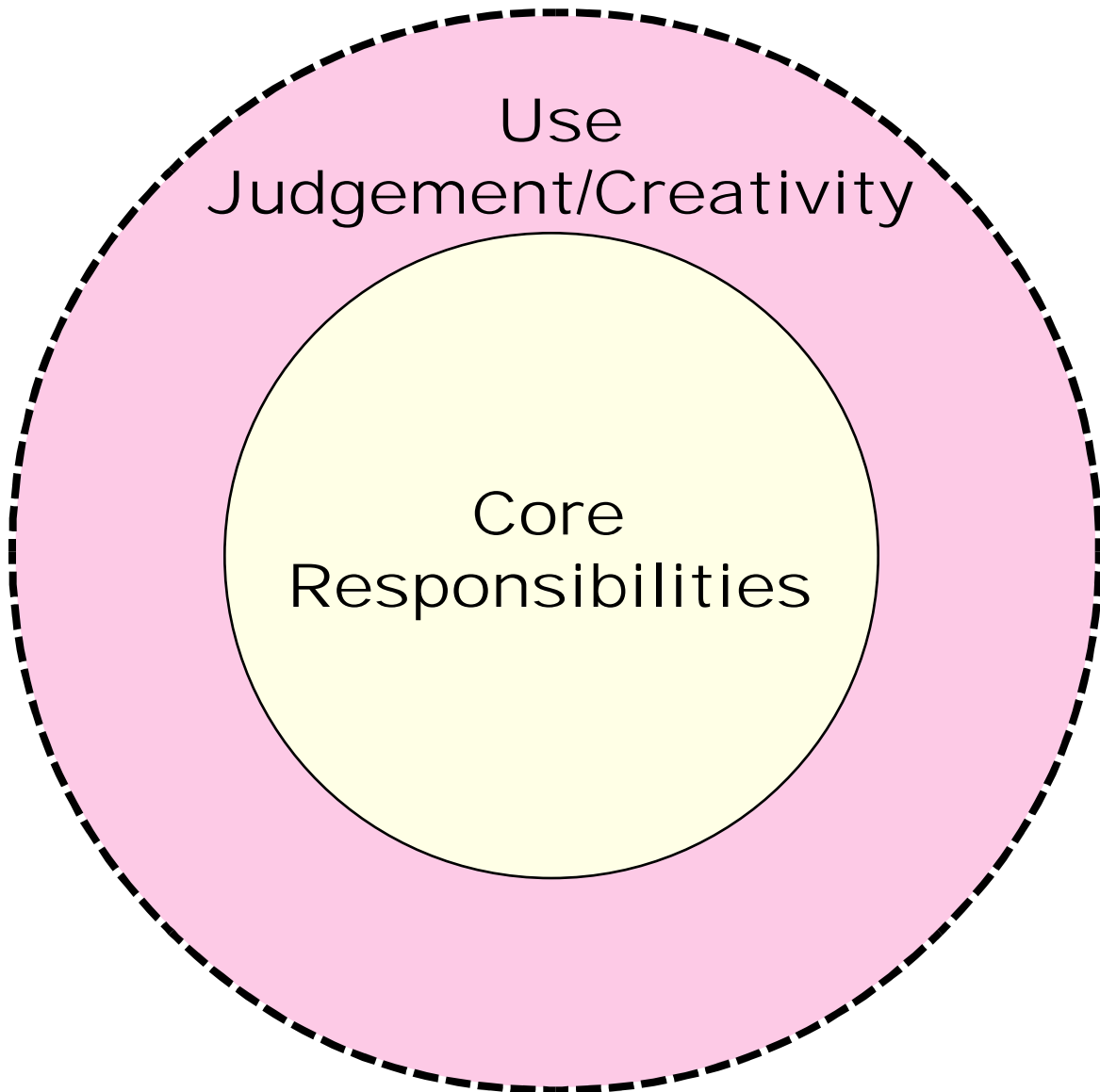
- be able to “navigate” local system
- have sufficient control over resources
- develop local capacity

## AMANDA'S MORNING RITUAL

- 4:00 A.M. SAM, CAT, WAKES ME UP TO BE FED -TRY TO WAKE-UP STEVE TO FEED SAM- DOESN'T WORK. FEED CAT COME BACK TO BED-STEVE (HUSBAND) IS SNORING, SLEEP OFF AND ON UNTIL ALARM.
- 7:00 A.M. ALARM GOES OFF, CLOCK SAYS 7:15 A.M. MUSIC ONLY NO BUZZER HIT SNOOZE ONCE OR TWICE (DEPENDING ON HOW LATE WENT TO SLEEP) GET-UP AT 7:09 OR 7:18 A.M. IF GET-UP LATE SKIP BREAKFAST
- STAND IN CLOSET, WITH DOOR SHUT SO LIGHT WON'T WAKE STEVE AND DECIDE WHAT I'M GOING TO WHERE FOR THE DAY.
- 7:15 AM TAKE CLOTHES TO BATHROOM AND TURN ON WATER IN SHOWER-MUST BE HOT, TAKE OFF PJS, GET IN SHOWER AND WASH BODY FIRST WITH MILD SOAP AND THEN WASH HAIR-MILD SHAMPOO. RINSE-SOMETIMES SHAVE LEGS
- 7-25 A.M. GET OUT OF SHOWER, USE 100% COTTON TOWEL THAT IS NOT 'SLICK\*', DRY OFF HAIR 1ST WORK DOWN TO ANKLES. FEET DRY ON THEIR OWN.
- SPRAY IN CONDITIONER (PAUL MITCHELL OR REGIS) LEAVE IN AND COMB THROUGH, PART HAIR AM LEFT
- WASH FACE WITH CLINIQUE-MILD SOAP, NO WASH CLOTH, USE CLARIFYING LOTION AND TAKE OFF EYE MAKE-UP WITH CLINIQUE EYE MAKE-UP REMOVER
- PUT ON DEODORANT/ANTIPERSPIRANT
- PUT ON UNDERWEAR, THEN TOP
- PUT ON EYE LINER AND MASCARA-NO OTHER MAKE-UP!!!-HURTS FACE
- PUT MOUSSE IN HAIR
- 7:45 A.M GO INTO KITCHEN FIX BREAKFAST: BRAN CEREAL W/SKIM MILK, BANANA, OJ
- EAT BREAKFAST IN LIVING ROOM WHILE WATCHING THE TODAY SHOW AND THE WEATHER CHANNEL ON THE 8'S SOMETIMES 7:48 OR 7.58 GIVE CEREAL BOWL TO OREO, CAT
- 8:00 A.M. GO BACK TO BATHROOM, BLOW DRY HAIR: USE BIG BRUSH AND SPRAY GEL TO HOLD
- 8:17 A.M BRUSH TEETH, PUT ON SLACKS OR SKIRT
- FIND SHOES
- 8:23 A.M. QUICKLY KISS STEVE GOOD-BYE AND DECIDE IF COMING HOME FOR LUNCH
- LOOK FOR KEYS AND PURSE, RUN OUT THE DOOR GET IN CAR, LEAVE FOR WORK

# Inside a Person's Life

Not Our "Paid" Responsibility  
(Domain of friends)



# Examples from: Inside Elizabeth's Life

## Not our paid responsibility

- Don't interfere with the private time I spend with my friends. I don't need an interpreter, they are my friends and we communicate.
- Don't interfere with how I choose to handle the love interests in my life, I will ask for any advice I want and from whom I want.

## Use Judgement/Creativity

- What you try! (e.g., put on my sweater, cleaning cabinet tops, etc.)
- Help me find a meaningful paid job

## Core Responsibilities

- Try to find new things that she can do on her own
- Know how to care for her G-tube
- Know how she communicates and take time to communicate
- Help me find other ways to communicate with those that can't communicate with me now.

## TODD'S POSITIVE REPUTATION...

He's funny, has a great sense of humor, and a great laugh

He's enthusiastic about everything ~ good and bad days

He's a hard worker, and very helpful

He's so clear about what he likes and doesn't, and in telling you about them

What do you admire about Todd?  
his stubbornness - RC  
the mischievous look on his face  
and the glint in his eye as his  
response to questions or humor. -RC

The day of housemate (JK's) memorial service  
we were sitting next to Todd and had a hand  
resting on his tray. He picked up staffs hand  
and put it behind his head and slammed  
his head into it - Every time we put our  
hands back down he'd pick it up and do  
it again. Later, we tried rubbing his  
neck and head. He really loved it when  
we rubbed his head fast - like vibration  
fast. He was in such a good mood -  
clicking and talking and laughing ALL  
Day. Also at the house after the service -  
It was so funny.

He really likes another client named  
they work together in Area B and like each  
other alot. always makes sure he sits  
by Todd

Date	Activity: (what, where, when, how long, etc.)	Who was there? (staff, names, others, etc.)	What worked well about the activity? What should continue? What did you learn?	What didn't work? What must be different? What did you learn?
11/16	mount snow tires at US Schwab; 45 min.	Debi Chanda Carry	Letting him know in advance what were doing; going for a walk	If the sun's out - he'd rather be outside; when it was behind a cloud, he got unhappy
11/17/99	Visit Police Department Stephanie 30 min.	Chanda, Mary, Joan, Joe, Dan	His friend Stephanie at the P.D.	If its too noisy, he gets uncomfortable. He will let you know if he's uncomfortable thru facial expressions & vocalizations
11/23/99	Shopping at Freddy's 1hr	Debi Chanda	As long as we were moving he was content	If you stop too long, he gets uneasy. Watch his facial expressions & vocalization ~ If you don't keep moving he might start to hurt himself
—	—	—	—	—
11/24/99	watch school children practice for Christmas concert at Kennedy School 30 min	Dan, Chanda kids in the program	He likes to watch from the back. Check in with him often. Place him where he can see everything	He was not comfortable. Maybe try a smaller group. Maybe he doesn't like lots of kids around him. It was going well at first until there were more people, kids around.
—	—	—	—	—
12/6/99	Reading a book at home	Linda	Really colorful pictures, short sentences	The book was too long. It didn't have enough pictures, couldn't turn the pages fast enough
—	—	—	—	—
—	—	—	—	—
—	—	—	—	—

# How Do You Communicate With Us?

<b>What is happening</b>	<b>_____ does</b>	<b>We think it means</b>	<b>And we should</b>

# ELP Communication Section

Focus Person (receiving services): Jane Doe

How do you know that Jane likes something?

How do you know that Jane dislikes something?

Other important information regarding how Jane communicates with us:

Other important information regarding how WE should communicate with Jane:

Communication Table

In this situation	When Jane does this:	We think it means this:	You should do this:

[NOTE: This is a working document and should be updated as changes occur and at least annually.]



## HOW LIBBY COMMUNICATES WITH YOU

WHEN THIS IS HAPPENING	LIBBY DOES THIS	WE THINK IT MEANS	AND WE SHOULD
you're lost or confused about something	whacks you	She knows what to do or where to go or wants you to pay attention	pay attention to her
you're daydreaming	jerky motion	She wonders what you're thinking and wants your attention	get with it
you're tense	<p> rubs your neck</p> <p> wrings her hands</p> <p> shakes head, flails, moans</p> <p> says "I'm sorry"</p> <p> nods</p> <p> moans/meows</p> <p> pouts</p>	<p> Knows you're stressed</p> <p> I'm nervous</p> <p> It's usually about my temper</p> <p> That means "yes"</p> <p> Come here or look at me</p> <p> She's unhappy</p>	<p> enjoy it</p> <p> reassure her (e.g., talk, hold her hand)</p> <p> talk to her about it, change activities if not desirable</p> <p> if not sure, help Libby stay at midline (hold arms, body, head straight)</p> <p> pay attention to her</p> <p> talk to her about it, give her 'space' if needed</p>

## How Michelle Communicates with Us

<b>What this is happening</b>	<b>And Michelle does</b>	<b>We think it means</b>	<b>Then we should</b>
Eating		She may not like the food	Change the food to something else
		or	
		She may not want to participate	You must entertain her throughout the feeding with music or voice
		or	
		She may not want to eat	STOP
		Won't open her mouth and may turn her head to the side	Stop. Don't keep trying.
Reading Time	Begins to yell	May not like the book	Change to a different book
Outdoor Activities	Begins to yell	She doesn't want to be outdoors	Take her back indoors
In prone Stander	Begins to yell	She cannot tolerate the prone stander	Take her out of prone stander
In corner chair		She has changed her position in the chair	Check the straps and her positioning and reposition her
		or	
		She cannot tolerate the corner chair	Take her out of corner chair
In bed or lap	Flail arms/legs	She is very happy	Continue the tape or conversations
Anytime	Begins to yell	She wants attention	Talk, sing, or read a book to her

## THINGS WE NEED TO DO TO COMMUNICATE WITH ERIC

We Want to Let Eric Know	To Do This We . . . . .	And Then Support/Encourage Eric To . . .
It's time to get up (if Eric is not already awake).	Knock on Eric's bedroom door and then open it.	Continue Eric's morning routine. See "to be successful"
It's time to have a bath.	Start to run the bath while Eric is in his bedroom and when the bath has run open his bedroom door.	Eric will get into the bath unsupported.
It's time to have a shave.	Show Eric his razor and shaving cream.	Apply shaving cream and have a shave.
It's time to have hair washed.	Show Eric shampoo.	Apply shampoo and have his hair washed.
It's time to get dressed.	Show Eric his clothes.	To get dressed by prompting Eric and letting him know what he needs to do, for example, pointing and tapping his leg to lift, etc,
Breakfast/lunch/dinner/snack is ready.	Show Eric his meal. Encourage Eric to go into dining room.	Sit at the table and eat his meal.
It's time to take medication.	Show Eric the syringe.	Sip his medication.
It's time to have teeth cleaned.	Show Eric his toothbrush.	Come and sit in the kitchen and have his teeth cleaned.
It's time to go to the toilet.	Show Eric incontinence pad/leg bags/enema	Walk to the bathroom by pointing and guiding him by his elbow.
It's time to go out.	Show Eric his boots.	Put his boots on and walk to the door.
It's time to go for a walk.	Guide Eric past the car to the gate.	Walk at his own pace.
It's time to go out in the car.	Show Eric the car keys or rattle the car keys.	Walk to the car.
It's time to go to the pub.	Show Eric his pint pot glass.	Support Eric to go to the pub.
It's time to go to the shop to buy chocolate.	Show Eric a chocolate wrapper.	Support Eric to go to the shop and buy chocolate.

## How Dean Communicates with Us

<b>What this is happening</b>	<b>And Dean does</b>	<b>We think it means</b>	<b>Then we should</b>
He is eating	Dean won't eat his pudding	He may not be feeling well	Take his temperature (if over 100 degrees, get appt. with Dr. Choy)
	Dean won't eat his pudding for the 2nd meal in a row	Something is really wrong	Call Dr. Choy as soon as his office opens
	Dean spits his food out	He doesn't want anymore of the food you are giving him	Stop feeding him that (Tip: Rotate what he is eating).
	Dean opens his mouth	He is ready for another spoonful	Give him one
In his wheelchair	Dean starts throwing his arms or fussing	He may be uncomfortable. (There are times when he can't control his arms and it doesn't mean anything.)	1st - Try to reposition him. If that doesn't work, then take him out of his chair
Anytime	Dean violently throws his arms, grits his teeth, and won't sleep for over 36 hours	There may be a medical problem	Watch him closely and call Dr. Marks (it it continues for more than 36 hours)
	Dean bites his hand	He is in a lot of pain	Pay attention to what is happening and how he was positioned right before he started biting his hand
	Dean sleeps the majority of the day for 3 days	There may be a medical problems	Watch him and call Dr. Marks if still occurring after 3 days
	Dean is quietly sitting (see picture)	He is content and likes what he is doing	Don't worry, be happy
	Dean grimaces (see picture)	He doesn't want to be touched or "messed with"	Leave him alone, it that is possible. (Note: He'll do it whenever you brush his teeth and wash his face).

## Jon's Communication Table

In this Situation	When Jon does this:	We think it means:	And You should do this:
When Jon cheats with his food or diet	Gets mad and agitated and may direct that at you	He feels really guilty	Give him his space. Later, try to figure out what set him off. (It may not be apparent or related to what you said.)
Anytime	Jon tells you he needs space	He needs space	"Back off" and give him the space. He may also remove himself from an area to get space.
Anytime	Jon repeats a word or phrase over and over	He is getting angry	Use a soothing, calm voice to try to find out the problem. (Give him space if he gets more agitated.)
Anytime	Jon sighs	He wants a chance to talk about what's wrong	Listen to him. Let him know you want to know what is going on in his life.
Anytime	Talking under his breath "I can't believe . . ."	Jon is getting very agitated or frustrated	Let Jon decide when he is ready to talk. Give him space until then.
Anytime	Jon is scratching or picking at himself (face, ears, arms). [Note: He will scratch until he hurts himself.]	He is confused or very frustrated	Try to calm him down by speaking in a cool, calm voice. Jon will talk when he is ready.

**Developing and implementing essential lifestyle plans**  
**An outline for “painless” plan development and implementation**  
Michael W. Smull

1. Develop a first plan that meet the following standards:
  - It describes what has been learned about -
    - What is important to the person, and
    - What others need to know or do to support the person
  - It is better than what you had
  - It will do no harm
    - It will help to maintain and enhance existing relationships
    - It respectfully addresses all important issues of health or safety; and
  - It reflects a commitment -
    - To act on what has been learned and
    - To continue to learn.
2. Review the plan with the individual (if the person does not use words to talk - review with someone who reflects the desires of the person), make any changes needed, and copies are given to the individual and their supporters.
3. Ask everyone involved to act on what has been learned and to note what they learn as they implement (preferably on the plan).
4. Encourage the learning by asking people variants of the following questions as you meet with the person and the supporters -
  - What have you learned?
  - What have you tried?
  - What else might we try?
  - What else do we need to learn?
  - What do we need to do next?
5. Take everything that has been learned and create a new plan as often as makes sense to the individual and the supporters (more often when there is more learning) –
  - Collect and put together what others have noted
  - Get people together to share what they have learned
  - Put the learning into a new plan
  - Review the new plan with the person
  - Get the new plan out to the person and the supporters
  - Schedule the next time the person and the supported will get together
  - Continue the cycle of learning, acting, reflecting, and learning