

# **A PLAN IS NOT ENOUGH - EXPLORING THE DEVELOPMENT OF PERSON CENTRED TEAMS**

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## **INTRODUCTION**

This chapter identifies critical issues in the implementation of essential lifestyle planning (Smull and Burke-Harrison, 1992), within a team supporting two people with profound and multiple learning disabilities. The action research took place in a learning disability service where the researcher worked as a development worker. The service supports people in group homes of two, three or four people.

The model of action research used was spiralling stages of: initial idea; reconnaissance (fact-finding and analysis); planning; implementation; reconnaissance (evaluation); revision and amending the plan (after Elliot, 1991).

There were many positive outcomes from developing the essential lifestyle plans. However, after four months, there was a lull in activities and monitoring. Effective implementation was limited, as the essential lifestyle plans were not integrated within the culture and process of the team. Job supervision, team meetings and team days were redesigned to incorporate the essential lifestyle plans. The research concludes that simply having a plan is not enough to ensure that people's lives continue to change. The plan needs to become part of the culture of the team, 'the way that we do things around here', rather than seen as an extra piece of work. Through this research, and influenced by the 'Team Performance Model' (Drexler, Sibbet, and Forrester, 1994), six key questions are identified for teams who want to implement person centred plans and develop as person centred teams.

## **INITIAL IDEAS**

In the early 1990's attempts were made to improve individualised planning in the service by revising the paperwork and producing standards. However, these strategies did not to produce lasting change. A group formed to improve individualised planning across the service, known as the 'Planning Action Group'. The group began by evaluating the content of goals set in individualised planning. This revealed that 37% of people who used the service did not have any

form of plan or goal; 56% of people did not have any long-term goals, but had 3 or 4 short-term goals. The highest number of goals were set in the areas of improving health (21%) and skill building (16%). The lowest were in relationships (2%) and work (1%). The standard of goals setting was very poor, few being specific, measurable, achievable, realistic and timelined as Sigafos, Kigner, Holt, Doss, and Mustonen, (1991) recommend.

This analysis shows that staff were placing greater emphasis on the more traditional Individual Programme Planning (IPP) goals of improving skills and maintaining health, instead of the goals articulated by the organisation's mission statement of communication and autonomy, relationships and community integration. Recognising this mismatch, the senior managers wanted to explore person centred planning and shift the emphasis towards increased community involvement and relationships (Hagner, Helm and Butterworth, 1996; Malette, Mirenda, Kandborg, Jones, Bunz, and Rogow, 1992; Mount, 1987). The senior managers commissioned the Planning Action Group to improve planning and make it more person centred.

Different members of the Planning Action Group were trained in different styles of person centred planning to begin to explore how to introduce person centred planning in the service. These included essential lifestyle planning, Personal Futures Planning, PATH and MAPS. The group used the different planning processes on their own lives to get a better understanding of the different styles. Essential lifestyle planning was the chosen style for two reasons: 1) it provided detailed day to day information about what was important to people and 2) it specified what support people needed. At this time the service held mainly clinical information about people, which although useful for supporting people did not acknowledge what people who used the service saw as important in their lives. Essential lifestyle planning was originally designed for use in residential services for people, unlike the other planning styles which were not designed for implementation within a service (Mount, 1990; O'Brien, Lyle O'Brien and Mount, 1997; O'Brien and Lovett, 1992).

Traditionally in the service, innovation was disseminated through an initial training course followed by cascade training, or, in the case of IPP, a new paper form was created and disseminated. No training in goal planning had been provided, although staff generally rate such training as a high priority (Raynes and Sumpton, 1987; Sturme, 1992). The service had relied on the distribution of ten forms to complete. Complicated paperwork was one of the frequent criticisms by staff of the IPP process (de Kock et al., 1988; Fleming, 1988, 1985; Humphreys and Blunden, 1987; Sutcliffe and Simons, 1993; Wright and Moffat 1992). The number of forms and anecdotal comments from staff reported back to the Planning Action Group suggested there were difficulties with it.

## **THE AIM OF THE RESEARCH**

Although the researcher had been trained in essential lifestyle planning, the group were concerned that simply providing training and materials was insufficient due to the `uncharted` nature of implementing person centred planning. Little was known about individual implementation (Marrone, Hoff, and Helm, 1997), and even less about organisational implementation. Even skilled facilitators faced difficulties and dilemmas in implementing planning. The group decided that further research was required before implementation could begin. Hagner et al. (1996, p.170) calls for discovering, “Strategies for maintaining energy and commitment” before wider implementation can take place. This suggests that learning about implementation from a small number of people could be helpful before the organisation could embark on wider implementation.

There is a history in the service of making quick, ill thought out changes to practice and procedure. To counter this in the area of planning required in-depth research and action to begin to learn to implement essential lifestyle planning. It was necessary to gather rich data focusing on a team and their complexity over time. This also enabled the research to be ‘bottom up’, in response to a ‘top down’ research brief and for greater participation to be introduced (Whyte, 1991). Therefore a longer, more detailed process of implementation was required. The research was therefore focused on a small ‘case study’ in depth.

Through discussion with the Planning Action Group and senior managers, a research aim was agreed: to explore critical aspects of the implementation of a style of person centred planning (essential lifestyle planning) within a complex organisational context.

A research methodology that focused on learning through action was therefore required and action research was selected, working with two people who have significant disabilities.

The Planning Action Group was concerned with the difficulties in planning with people who had profound and multiple learning disabilities who did not use language. Literature that specifically addresses the issues related to effectively involving people with profound and multiple learning disabilities in planning is scant (Sanderson, Kennedy, and Ritchie, 1997). This reflects the broader issue of how important issues in the lives of people with profound and multiple learning disabilities are `under-debated` and points to the “significant gap” between the knowledge provided by research where it exists and the reality of what is provided by services (Hogg 1998). People with profound and multiple learning disabilities are also regularly excluded or left until last in major service developments, for example the resettlement of people from long stay

institutions in the North West of England. Based on this research, which matched local issues, a decision was made to positively focus on planning with people with significant disabilities.

Therefore the research aimed to evaluate the process of implementing essential lifestyle planning within a team supporting two people with profound and multiple learning disabilities and from this to identify the implications for implementation within a service context.

## **PEOPLE INVOLVED IN THE RESEARCH**

The research focuses on Kath (all names used are pseudonyms) and Derek who live together in a shared house, and the team who support them.

**Kath** Kath is a single woman in her early thirties. Her parents live about thirty miles from Kath's house. Kath has a sister and a niece. She shares her council house with Derek, whom she lived with in a hostel five years ago. She stopped living with her parents when she was three as they 'could not cope'. She then lived in a children's home and when she became an adult, moved into the local social services hostel. The hostel was the subject of an investigation and subsequently closed amidst scandal of poor conditions and abuse. Kath was selected to live with Derek and together they moved into the council house as tenants. Kath attended the local adult training centre in the 'special needs' section during the week. In addition to profound learning disabilities, Kath has poor vision.

**Derek** Derek is also single and in his early thirties. He has no contact with his parents. He was removed from them by social workers when he was a baby as they had physically abused him. He has at least one brother, but there are no details of other relatives. He lived in children's homes before being moved to the hostel, and then to the 'group home' he now shares with Kath. Derek attends the same adult training centre during the week in the 'special needs' section. He has a car that is jointly leased with Kath. In addition to profound learning disabilities, Derek is described as having challenging behaviour.

A team of six staff supports Kath and Derek. An Assistant Manager (AM) leads the staff team. She is managed by the Network Manager (NM). The team comprised of Lucy, Dean, Andy, Sarah, Joan and James.

## **PLANNING WITH KATH, DEREK AND THE TEAM**

### **Developing The Plans**

The research began by spending time with Kath and Derek at their home, and talking with each member of the team individually to try and create a picture of what Kath and Derek's lives were like. The researcher found that Kath and Derek were seen and treated as a couple. Little was known about them as individuals, and they were perceived as having few interests. They spent much of their time watching TV when they were not at the day centre. The support that they received was inconsistent, and the team had low morale and poor communication.

The researcher worked with the team to map out Kath and Derek's relationships. She then spent time with each person on the relationship map to gather information for the plans (see Smull, Sanderson and Allen 2001, for a full description of the processes used within essential lifestyle planning). The essential lifestyle planning meetings were arranged once the plans had been drafted and checked.

The team wanted to change the meetings to make them more accessible for everyone. The team invited everyone who was on Kath and Derek's relationship map to their individual meetings. Invitations to Kath's meeting sent using coloured paper, written by a team member on Kath's behalf, asking for the reply to come her. This was in stark contrast to previous planning where typed letters had been sent from the office with a tear-off slip to return to the manager. Kath's meeting was arranged at the Church where she attended, in the hall, in the evening. A buffet was arranged to have part way through the meeting. Derek's meeting took place in his local pub's function room, with a door leading to the beer garden, where Derek could wander as he wished. It was held in a morning, and then everyone had lunch together in the pub. Everyone who attended the meeting commented on the difference in the tone and content of the meetings, compared to previous IPPs. Kath's Aunty talked about how included she felt. Several people said that they were surprised that Derek stayed, apparently happily in the room, as he had always become restless and distressed in all the previously meetings.

### **Implementing The Plans**

The team held an implementation meeting two weeks after the essential lifestyle planning meetings. At this meeting team members reviewed Derek and Kath's essential lifestyle plans and for each identified whether this was something that needed to happen on a daily, weekly or

monthly basis. The researcher then discussed with the team how much structure they wanted in their working week to achieve this. The team had indicated a preference for a flexible weekly structure. The team and the researcher translated the daily, weekly and monthly information onto a monthly plan. Some activities, like Derek's swimming had to be allocated to a particular day when Derek was not at the day centre. Other activities, for example, Kath's footspa and foot massage needed to take place twice a week, but did not need to happen on a particular day, so these were attributed to sometime during the week and people were able to fit this in at their discretion depending on what else was happening and their assessment of how Kath was feeling. Once the implementation plans were completed the team and the researcher discussed how to record and monitor the plan. People suggested that monitoring the implementation plan would be a good role for the keyworker who could provide a monthly summary, if people ticked and signed the activities they had completed. The team could then compare this to what the team had set out to do, according to the essential lifestyle plans.

Finally the team looked at whether there was anything that we had learned about each other through the team day, that could influence who supported Kath and Derek to do what activities. Several suggestions were made. For example, one team member was a keen gardener and agreed to support Derek in his gardening related activities. Another member of the team was a Catholic and wanted to take the lead in supporting Kath to go to Church. The team then discussed the logistical steps to make these things happen. The plans were then put into action.

**Table 1 : SUMMARY OF THE FIRST SPIRAL OF THE RESEARCH: DEVELOPING AND IMPLEMENTING THE ESSENTIAL LIFESTYLE PLANS**

<b>Aim</b>	<b>Method</b>	<b>Outcome</b>
<b>1) To Meet Kath and Derek</b>	<ul style="list-style-type: none"> <li>• Participant observation</li> </ul>	<p>Information gathered about Kath and Derek</p> <ul style="list-style-type: none"> <li>• Both Kath and Derek communicate without words. There does not seem to be a consistent understanding amongst the team on how they communicate</li> <li>• Their living environment is well furnished, appropriate for their age, with photos of them on the wall and other personal effects</li> <li>• They were watching TV during my visits, and there was little evidence of other activities (Kath had a keyboard)</li> <li>• Staff generally staff interacted with them in a warm and positive way</li> </ul>
<b>2) To develop relationships with the team and an understanding of how the team functioned</b>	<ul style="list-style-type: none"> <li>• Semi-structured interviews</li> <li>• Participant observation in team meetings</li> <li>• Documentary analysis</li> </ul>	<p>Information gathered about the team</p> <ul style="list-style-type: none"> <li>• The team see Kath and Derek as a couple and little is known about them as individuals</li> <li>• Kath and Derek are not involved in many activities (the team explanation is because of poor weather in the winter and a lack of drivers)</li> <li>• Communication within the team is generally poor, and team meetings focus on administration</li> <li>• There is little structure, organisation or clarity of roles</li> </ul>

<b>3. To develop Kath's essential lifestyle plan and Derek's essential lifestyle plan</b>	<ul style="list-style-type: none"> <li>• Developed relationship circles</li> <li>• Talked with people identified on the relationship maps</li> <li>• Drafted plan and shared this with the team</li> </ul>	<ul style="list-style-type: none"> <li>• Kath and Derek had individual essential lifestyle plans which revealed what we thought was important to them, a wide range of interests and what support they required.</li> <li>• The team now saw Kath and Derek as individual with different interests</li> </ul>
<b>4. To hold individual essential lifestyle planning meetings</b>	<ul style="list-style-type: none"> <li>• Planned the meetings with the team</li> <li>• Facilitated the meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Kath seemed to enjoy the meeting, sitting with people who cared about, her followed with food that she liked.</li> <li>• Actions were set at the meeting to ensure that Kath had what was on her plan</li> <li>• Derek stayed for the whole meeting, wandering into the beer garden during breaks, he also seemed to enjoy the meal afterwards</li> <li>• Actions were set at the meeting to ensure that Derek had what was on her plan</li> </ul>
<b>5. To have an implementation meeting</b>	<ul style="list-style-type: none"> <li>• Facilitated the meeting</li> </ul>	<ul style="list-style-type: none"> <li>• An implementation plan was developed that described who was going to do what on a flexible, monthly basis</li> <li>• Each person agreed to tick and sign an activity after it had been completed</li> <li>• The keyworkers agreed to provide monthly summaries, comparing the essential lifestyle plans with what actually happened that month</li> </ul>
<b>6. To evaluate the process and outcomes</b>	<ul style="list-style-type: none"> <li>• Semi-structured interviews</li> <li>• Documentary analysis</li> <li>• Participant observation</li> </ul>	<ul style="list-style-type: none"> <li>• Outcomes for Kath and Derek are outlined in Table 2</li> <li>• The team reported : <ul style="list-style-type: none"> <li>• appreciating the opportunity to stop and reflect</li> <li>• improved structure to their work with flexibility</li> <li>• an increase in morale and job satisfaction</li> </ul> </li> </ul>

## **CHANGES FOR KATH AND DEREK**

Implementing the essential lifestyle plans resulted in significant changes for Kath, Derek and the team. The main changes for Kath and Derek were that they were seen as individuals with a wide range of individual interests, who were given support to participate in a greater range of more varied activities. They also received more consistent and individual support from the team in pursuing these activities.

*“It has gone well: Kath and Derek are now being seen more individually and they are engaged in more activities than they were - different activities as well. Before, I’d say about this time last year, they were not doing anything at all really.”*

Anne

The activity charts completed following the essential lifestyle planning process also indicated this, which contrasted to the information gathered before the research began. Table 1 provides specific examples of these outcomes.

## **CHANGES FOR THE TEAM**

The team said that the planning had given them the opportunity to stop and reflect on what they were doing rather than continue with routines, or following what more established team members were doing. Another benefit was the improved structuring of their work, where important routines were clearly documented so that everyone could follow them the same way. The new structure also left room for flexibility and spontaneity within the parameters of the activities identified in the plans. Many team members attributed the process to an improvement in morale and communication within the team, and an increase in individual job satisfaction.

## **BARRIERS AND SOLUTIONS**

Implementing the essential lifestyle plans had been largely successful, yet there were still barriers. The amount of flexibility that could be created in a rota for a team of six people was a barrier. The evaluation also identified that there was a lull in activity and monitoring, and some activities were now not happening as frequently as specified in the plans. This extended to the monitoring of activities, which happened on an ‘ad hoc’ basis. The evaluation suggested that it had been very positive to give the team a chance to ‘stop and think’ about Kath and Derek; the team’s role in their lives and the way the team worked together. The evaluation also indicated

that the team were in danger of thinking that this learning and reflection was over now that the plan had been finished.

It is clear that strategies were required that 'keeps the plans alive', essential lifestyle planning the team reflect on what they are learning and problem solving together. At that time the essential lifestyle plans were not having any impact on job supervision or team meetings. Although implementing the essential lifestyle plans had resulted in restructuring the way the team organised their time and decision making, it needed to be further embedded within the team culture. This would involve the essential lifestyle plans influencing the support and supervision that team members receive; integrating them into team meetings and become generally part of 'the way we do things round here'.

## **EMBEDDING ESSENTIAL LIFESTYLE PLANNING INTO THE CULTURE OF THE TEAM**

The implementation of a plan needed not only agreement on how the plan would be implemented and monitored, but also how it could be 'kept alive' on an ongoing basis. If the plans were not embedded into the existing processes of the team, it ran the risk of being seen as additional to the team's work rather than central to it. By incorporating essential lifestyle planning within job supervision and team meetings, the plan could start to become part of the culture of the way the team worked rather than 'planning'. Overall this meant a theme of continuous learning and review, a feature of the modern 'learning organisation' which 'lies at the heart of individual growth and of corporate success' (Handy, 1994, p.48).

### **Changing Team Meetings, Team Days And Supervision**

Team meetings were restructured to provide opportunities for the team to identify what had worked in implementing the plans, what had not worked so well, celebrate what has worked and set actions to ensure that what has not worked will not be repeated the next month. Within team meetings, team members considered whether or not we had learned anything new about Kath or Derek, which might mean that means that their plan would have to be amended. Essential lifestyle plans also became a strong focus within job supervision.

In addition to these changes, opportunities were provided through team meetings and team days to focus on exploring values issues; different ways of increasing the team's understanding of

Kath and Derek; and clarifying and improving how members of the team work together. For example, the team developed their `Essential Team Plan` which, similar to an essential lifestyle plan recorded what the team needed to do to be successful in supporting each other and what their expectations were of working together. As part of this the team also wrote their own mission statement.

The team sought to learn more about Kath and Derek and their community, and expand the opportunities available to them. One example of this is during a team day the team brainstormed the questions `What might be considered typical and valued for a man or woman of Kath or Derek's age, living in their community who did not have a disability label?` The team set actions to support Kath and Derek in opportunities to try some of these experiences or activities. Further development days used some of the `maps` from Personal Futures Planning, for example, looking at community mapping.

**Table 2: CONTRASTING KATH AND DEREK’S EXPERIENCES BEFORE AND AFTER ESSENTIAL LIFESTYLE PLANNING**

<p style="text-align: center;"><b>Before Essential Lifestyle Planning</b></p>	<p style="text-align: center;"><b>After Essential Lifestyle Planning</b></p>
<p style="text-align: center;"><b>Kath and Derek were seen as a couple</b></p> <ul style="list-style-type: none"> <li>• Kath and Derek were often supported to do the same activities at the same time, even their dental check-ups were booked together.</li> <li>• The priest from the local Church had been invited to become both Derek and Kath’s advocate, even through Derek did not go the Church.</li> </ul> <p style="text-align: center;"><b>Little was known about them as individuals and they were seen as having few interests</b></p> <ul style="list-style-type: none"> <li>• Staff did not know who the people were in a photo on the wall of Kath with a baby</li> </ul> <p style="text-align: center;"><i>“Some staff come to me and say what do you think about Kath doing this or Derek doing that, and it is like they still do not properly know them – even though they have been working with them for a long time.”</i></p>	<p style="text-align: center;"><b>Kath and Derek were seen as individuals with a wide range of interests</b></p> <p>After the plan Kath:</p> <ul style="list-style-type: none"> <li>• was supported to see her Aunt, every two months,</li> <li>• go to live music and discos,</li> <li>• going to mass regularly,</li> <li>• have her favourite drinks on a Friday,</li> <li>• have aromatherapy and massage every fortnight,</li> <li>• use a footspa every week,</li> <li>• have facials and manicures every fortnight</li> <li>• go to spa baths every month,</li> <li>• be involved in cooking and baking every week</li> <li>• and using her keyboard</li> </ul> <p>st Kath loved loud music and bustling places, Derek prefers quiet activities, that include:</p> <ul style="list-style-type: none"> <li>• going out in the car every day</li> <li>• going swimming every week</li> <li>• walking in the country, in wide open spaces</li> <li>• eating out (preferably for a curry) each week</li> <li>• going to the local (quiet) pub each week</li> </ul>

- Decisions were made on the basis of what staff thought was good for Kath and Derek, on the weather, and what staff preferences were

*“Like this Saturday, Lucy came in at 3pm, and I said to her, while you are catching up reading the books, I will bang a curry in and as it is a lovely day we can take Kath and Derek out for a couple of hours while it cooks. What would you like to do in the evening?”*

*Dean*

- Decisions were made on the basis of what staff knew were important to Kath and Derek, as recorded on their plans.

*“Kath and Derek are now seen as individuals... Staff are seeing Kath and Derek as individuals rather than as a couple, because talking about their individual interests rather than seeing them as a couple ‘It feels like staff know Kath and Derek much more - in their interests what makes them happy, what makes them sad etc.’”*

*Anne*

<p style="text-align: center;"><b>They were not involved in household or leisure activities</b></p> <ul style="list-style-type: none"> <li>• Staff collected Kath’s benefits without her.</li> <li>• Derek was left with agency staff who was reading the paper, whilst another member of the team took the car to have a tyre changed (going out in the car is something that is ‘most important’ to Derek).</li> <li>• When I visited Kath and Derek, the house diary for the previous week did not list any activities other than attending the local day centre. The most frequently recorded item over the previous six months was ‘Derek had a good bowel movement’</li> <li>• The team attributed this to there only being two people who could drive, and poor weather</li> </ul> <p>Kath and Derek spent a lot of time watching TV (Kath without her glasses)</p>	<p style="text-align: center;"><b>They were more involved in household activities</b></p> <ul style="list-style-type: none"> <li>• They both collected their benefits on different days</li> <li>• They were involved in shopping on different days</li> <li>• Kath was involved in baking and cooking</li> </ul>
<p style="text-align: center;"><b>They received inconsistent support</b></p> <ul style="list-style-type: none"> <li>• Joan put Kath on the treadmill to help her get fitter, but Sarah did not because she thought Kath did not like it.</li> <li>• The team supported Derek in three different morning routines, some days he would get undressed in the bathroom, some days in his bedroom, depending on the team member</li> <li>• Staff had different ideas about what Kath and Derek were communicating</li> </ul>	<p style="text-align: center;"><b>They received more consistent and individual support</b></p> <ul style="list-style-type: none"> <li>• Both Derek and Kath’s morning, and evening routines were recorded and used</li> <li>• Both Derek and Kath had communication sections and staff were using these to respond to their communication</li> </ul>

## **FURTHER CHANGES FOR KATH, DEREK AND THE TEAM**

Derek and Kath had opportunities to try new activities and experiences as a result of the work the team did on their team days. A significant difference was in their relationships, as they team concentrated on supporting and encouraging their existing relationships and seeking ways to develop new relationships.

The team reported improved meetings, better communication, more focussed supervision, clearer expectations and generally better team working and morale

Joan sums up the impact that she thought the research had;

*“When we first started I thought it was crazy. I thought that Kath and Derek could not even communicate, and it would have been better to have done it (the research) with people less disabled. I thought ‘what more can they do?’. I have been amazed at what more they could do. Now it feel like they were just doing the bare necessities for existing. I was very wrong - they have so many interests and preferences. The sheer joy of trying things out and finding out that they enjoy it...”*

## **THE RESEARCH PROCESS**

The research process used was action research. Elliot (1991, p.69) describes action research as “the study of a social situation with a view to improving the quality of action within it”. Detailed descriptions of the shared features of action research can be found in Argyris (1983); Hart and Bond (1995); Susman and Evered (1978) and Shani and Bushie (1987) amongst others. The research followed two cycles of Elliot’s (1991) action research process of:

1. Initial idea
2. Reconnaissance (fact finding)
3. Planning
4. Implementation
5. Reconnaissance (evaluation)
6. Revise
7. Amend plan
8. Implementation  
Reconnaissance (evaluation)

Data collection methods included a document review; reflexive diary; semi-structured interviews; and participant observation.

As the task was to implement Essential Lifestyle Planning across the service eventually, it was important to learn locally what the critical issues are that need to be considered when planning a more extensive implementation. In accordance with this, the researcher worked alongside the manager and the team as an active participant observer, to facilitate the two essential lifestyle plans. In this way, and in keeping with the principles of participatory or collaborative action research, the participants and researcher learned together about how to implement planning.

### **CAN WE LEARN FROM THIS ABOUT KEEPING PLANS ALIVE AND ENCOURAGING CONTINUOUS LEARNING?**

Teams are a key component of organisational effectiveness (Crom and France, 1996; Guzzo and Dickson, 1996). ‘Good practice’ in services means that staff teams need to “develop, consistently implement, monitor and revise a logically coherent plan for providing support to service users” (Emerson, Hastings and McGill, 1994, p.211). The original problems that this research was designed to address were the perceived difficulty with developing the coherent plan that Emerson et al. (1994) refer to. Whilst the introduction of essential lifestyle plans has been demonstrated to have specific benefits for Kath, Derek and the team, the research indicated that the implementation and monitoring of a plan needs to be addressed further.

Ideally, an organisation operates through both formal ‘rules’ and contingencies that reflect the mission of the organisation, the roles of the staff and mechanisms for ensuring that staff deliver a service commensurate with both. In reality the organisation may not have a guiding mission, staff may be unclear about their role and there may be few, if any systems for providing feedback to staff (Emerson et al., 1994). In the absence of this, peer groups define what should be done, and informally monitor each others performance, however this might be at odds with the service’s aims and mission (Ryan and Thomas, 1987). Services have often tried to address these issues through staff training and providing additional staff. However research demonstrates that there is not always a direct relationship between the number of staff and the quality of the support received by services users (Chinsky, 1974; Harris, Veit, Allen, 1974; Mansell, Felce, Jenkins and de Kock, 1982; Seys and Duker, 1988) and that short training courses do not always

have long term effect on staff behaviour (Reid, Parsons and Green, 1989; Ziarnik and Bernstein, 1982).

Therefore a clear understanding of values linked to the organisations mission, and the development of team performance become significant issues to be addressed. As O'Brien and O'Brien state:

*“Creating ways to develop competence and leadership in team members and team leaders are the most important operational investments the agency makes.”*

O'Brien and O'Brien 1994, p.132

The process used in the current research to develop the team corresponds with some of the stages for team development in the 'Team Performance Model' (Drexler et al., 1994). This involves supporting the team to develop in ways that move them from simply being a group to becoming a team with a sense of shared commitment that strives for synergy among members (Katzenbach and Smith, 1993). There are many labels used for such teams, including empowered teams and semi-autonomous teams. These are teams of employees who work in a team; typically performing interdependent jobs; who are given responsibility for many aspects of their work, such as planning, scheduling and assigning tasks to members (Dobbelaere and Goepfinger, 1993). Research suggests that these teams are more effective and report higher levels of satisfaction (Cohen and Ledford, 1994; Cordery, Mueller and Smith, 1991) than more 'traditional' teams. However the success of these teams may depend on the dominant values and nature of the organisation (Smith and Comer, 1994).

The term used here for a semi-autonomous team is 'person centred team'. A 'person centred team' is a term used here to describe a team who see their purpose as supporting a person to achieve the lifestyle they want as part of their local community; who are characterised by a willingness to continually listen, and learn; and who highly value personal commitment and relationships with the people they support. This term was first used by Mount (1992), yet is not widely used, and there is no literature available on how to develop and support a person centred team. The assumption appears to be that if you have a person centred plan then it is simply a matter of implementing this. However, this research has demonstrated that this is not a simple equation and work needs to be done with teams to support them to embed the plan within the

culture and processes of the team, and to provide structured opportunities for reflection. Through this research, and influenced by the 'Team Performance Model' (Drexler et al., 1994) six key questions are identified that need to be addressed by teams seeking to work as a person centred team, finding ways of implementing person centred plans. The questions are not chronological, each question may need to be revisited several times over a team's 'life', for example when existing team members leave and new people join, the first questions will need to be revisited. The model is an acknowledged simplification of team development. For example differences usually occur between different team members in how they resolve their concerns. However, Drexler et al. (1994) suggest that team members share a 'centre of gravity', a general common understanding about how the team is doing. This is illustrated in the research where there was a general understanding about the way that the team communicated and ideas about what needed to change. The third question is where issues of person centred planning begin to be addressed.

### **10.1 Question 1: 'WHY AM I HERE?'**

This question is about team membership and acceptance and begins to clarify values and direction. O'Brien and O'Brien (1994) see this as a key issue for effective organisations:

*"The support worker has to be clear about the ways in which his or her personal preferences and values may differ from those of the person supported and keep re-creating ways to avoid imposing on that person without compromising his or her own integrity."*

O'Brien and O'Brien, 1994, p.122

As part of addressing individual values, each team member needs to consider why the team is here; whether they want to be here; and whether what the team is doing has some personal meaning for them. This stage reflects the importance of a clear organisational mission statement and shared values (Emerson et al., 1994; Kotter, 1996; Peters and Waterman, 1982; Senge, 1990), so that the team members are not just asking this question of the team but also of the organisation.

This first question, as with the other questions, needs to be continually revisited for team members to add depth to their understanding of values and how this affects their work and this is a key role for the team leader.

O'Brien and O'Brien (1994) state that:

*“An effective staff team leader collaborates with team members to develop, renew, and deepen commitment to the values and direction the ...agency stands for”*

O'Brien and O'Brien., 1994, p.123

## **10.2 Question 2: ‘WHO ARE YOU, AND HOW CAN WE WORK TOGETHER?’**

The second question focuses on building trust within the team to answer the question ‘Who are you?’ and the hidden question ‘What will you expect from me?’. Without trust the flow of information on the task and goals is threatened, and information may be withheld and distorted (O'Brien and O'Brien, 1994). The amount of trust will vary across members and over time.

Research on trust and familiarity between team members indicates that lower levels of familiarity were associated with lower levels of productivity (Watson, Kumar and Michaelsen, 1993). However some research also indicates that in teams that have worked together for over three years member familiarity may become detrimental to group performance (Katz, 1982). Therefore developing trust and familiarity is important. However, in the longer term attention needs to be given to any possibly negative effects, e.g. complacency that may arise from this. Handy (1994) stresses the importance of developing trust and familiarity within a learning organisation:

*“Today we are seeing an increasing number of organisations made up of shifting ‘clusters’ of teams that share a common purpose. The need for togetherness, both to get things done and to encourage the kind of exploration that is essential to any growing organisation, creates the conditions for trust. Trust, in turn, improves togetherness”*

Handy, 1994, p.48

In the initial analysis of how the team was working together (Stage 2) there was some trust amongst some team members and some distrust by some people of Dean's motivation, suggesting that he withheld information, and dominated decision-making processes. A significant part of this trust building is being clear about what peoples' support needs are and how these can be met. By working with the team to directly addressing how the team would support each other through the Essential Team Plan some of these issues were addressed. There are formal team assessment processes that can be used in this stage to increase interpersonal understanding, such as Belbin's team profile (1981) or the Team Performance Inventory (Drexler et al., 1994).

Over time, this question can be revisited to add depth to team member's understanding of each other, and in addition to discovering who the team members are and what support they need, they can also share what their aspirations are.

### **10.3 Question 3: 'WHAT ARE WE DOING?'**

The task of question 3 is to clarify as precisely as possible what the team must do and what the roles of the individual team members are to accomplish this. This will be informed by the answers to Question 1: Why are we here?. Now it needs to be contextualised to the specific issues facing the people the team is employed to support. In person centred planning the question is 'Who are the people we are employed to support, what is important to them, what support do they want/need and what is our role in providing this?.' Person centred planning and in this case, essential lifestyle plan is the central mechanism for answering these questions. Research demonstrates that compared with the absence of goals (or ill-defined goals) specific goals for groups raise group performance on those dimensions reflecting the quality of the goal (Weldon and Weingart, 1993). Therefore goals for improving the quality of the team's work tend to raise quality and so on. Goals raise team member effort (Weldon, Jehn and Pradhan, 1991) and stimulate co-operation and communication within teams (Locke and Latham, 1990). Drexler et al. (1994) state that:

*"When a group can define its agenda clearly and achieve some consensus on it, and agree on the roles demanded by its goals, it has a common basis to guide the organisation of its work. Its energies can thus be directed outward toward the task, setting the stage for both structure and creativity."*

Drexler et al., 1994, p.15

Therefore, developing goals from person centred planning is an important stage for the effectiveness and development of a team.

### **10.4 Question 4: 'WHO DOES WHAT, WHEN AND WHERE?'**

This takes the person centred plan and the goals identified from it and asks 'Who needs to do what, when and where to make this plan happen? It also returns to what was learned from question 2 about team members, so that the interests/talents of team members can be used to support the individuals receiving services. Active Support provides specific procedures for implementing plans and could be used to address this question.

In this research this was achieved at the implementation meeting. It also needs to expand beyond a crude 'who will do what by when' to address issues of what power the team has individually and collectively in making changes. Staff need to be clear about what they can change and what they cannot change. The emphasis needs to be on the power going to the lowest level possible within the organisation, the direct support staff, wherever possible. This is a key characteristic of a learning organisation and is encapsulated in the word 'subsidiarity', meaning giving away power (Handy, 1994). Handy (1994) states that:

*"While no one does that willingly in most organisations, the idea is at the heart of the learning organisation. Subsidiarity is written in capital letters at the head of its statements of values and beliefs. In these organisations power is given to those who are closest to the action."*

Handy, 1994, p.50

Whether this is defined as giving away power or sharing power, this is managed by clearly defining the boundaries of the job within the context of the persons' plan. Handy (1994) states that there are two boundaries. The 'inner boundary' defines the essential core of the job which in this context means that the Most Important, Second in Importance and Third in Importance and support issues as defined by the essential lifestyle plan. This part of the job is clearly defined with specific roles and responsibilities as identified by the essential lifestyle plan and implementation plan. If these are not done the team has failed to implement the plan and this must be addressed. The 'outer boundary' Handy (1994) defines as 'the limits of discretion' and therefore this presents scope for initiative and for personal responsibility.

Gore (1994, p.50) makes an eloquent distinction between the two boundaries. He suggests that there are experiments above the water-line, which do little harm if they go wrong, and there are experiments below the water-line, which might sink the ship. He suggests that: 'The former are encouraged: the latter are outlawed.'

In many traditional organisations there is limited space for initiative and control is tight. In a learning organisation, the space between the two boundaries needs to be enlarged as not every aspect of a job can be prescribed in advance (Handy, 1994). This is the case in person centred planning. This approach, of specifying with the team at the time of implementation exactly what they could use their initiative for and what was 'below the water line', would have been very useful with the team featured in the research. As the values were not sufficiently clarified and these boundaries not discussed, team members learned of the difference by default.

One example is where Dean supported Kath to go for a walk on a Sunday morning instead of attending Mass. Dean was an atheist and did not personally value attending Mass. Mass was on Kath's essential list and therefore was 'below the water line'. Although this was not 'below the water line' for the organisation generally, it was for Kath as described by her essential lifestyle plan. The team had not fully explored where their values might differ from what was expected by the people they supported and the issue of where it was acceptable to use initiative and where it was not, and therefore these 'mistakes' occurred. If the stages of the person centred team development model had been effectively implemented this could have been avoided. Smull (1997) has devised an exercise called the 'donut exercise', based on Handy's ideas to essential lifestyle plan teams examine these issues based around an essential lifestyle plan. It consists of three concentric circles. The first is identified as 'core responsibilities' the second outer circle as 'requiring creativity and judgement' and the third outer circle as 'not our paid responsibility'. He encourages teams to consider each item on the essential lifestyle plan and discuss which circle it would go in, for example whether it is that part of our core responsibility ('below the water line') or whether it is an area that we need to use creativity and judgement ('above the water line'). This could be useful in completing this stage with teams.

Handy (1994) emphasises the importance of this stating:

*"each individual or team must understand very clearly which types of initiatives are acceptable and which are not. Everyone has to agree on the definition of success. Control depends more on a common understanding that on budgets and procedures. Shared values reinforce constant and effective communications, all of which are essential if subsidiarity is going to work."*

Handy 1994, p.50

### **10.5 Question 5: 'HOW ARE WE DOING?'**

This involves looking at how the plan is being implemented and how the team is working generally by asking, 'What is working? What is not working?', and by celebrating and problem solving the answers to these questions. It also requires that the team ask what else it is learning about the people they support and how the plan may need to be adapted to reflect that. This reflection needs to both happen on a daily basis by individual team members and in a more formal and structured way for example in individual supervision, team meetings and planning review meetings. Research with business students found that where students participated in setting the goal and got feedback from each other the percentage of successful students rose from

5% to 61% in one study (Kolb, Winter and Berlew, 1981). Pearson (1991) also found statistically significant increases in productivity over time as a result of receiving performance feedback.

This question needs to be asked on a continual basis through a cycle of learning. This is the learning organisation in operation. This learning extends to the team leader giving individual team members feedback about their own performance. Evidence suggests that performance improves in relation to the quantity of feedback, and the absence of feedback was accompanied by high hostility and low confidence whilst a high level of feedback, no matter whether good or bad, brought with it high confidence and friendly attitudes (Leavitt and Meuller, 1951). Therefore to set goals, roles and responsibilities and then forget about them is only going to produce frustration as well as inefficiency (Handy, 1981). In addition, research has found that when the goals include some that specifically relate to self-improvement, that this significantly improves the number of goals achieved (Kay, French and Myer, 1981).

#### **10.6 Question 6: ‘WHAT ELSE CAN WE TRY?’**

As well as reviewing existing goals and processes the team also needs to use other ways to discover more about the people they support by using different ways of thinking about the person’s life. This happened for the team in this research through using other techniques, for example, using maps from Personal Futures Planning (Mount, 1987) and setting actions from these. By building this into a stage of team development, essential lifestyle plan can be used to extend opportunities rather than only supporting existing ones. As Smull and Danehey, (1994) suggest:

*“Person centred planning efforts simply provide a structured process by which this understanding can be achieved. However, doing a good person-centred plan once is essential but insufficient. Continuous active treatment should be replaced with continuous active listening. Facilitating changes in whom the individual lives with, what the individual does during the day, or daily routines, and so forth should be seen as the norm rather than the exception.”*

Smull and Danehey, 1994, p.67

As well as team competence, Handy (1994) states that teams also need curiosity to keep learning and then forgiveness if it goes wrong or celebration if it works.

Handy (1994) identifies a ‘learning wheel’ as a way of doing this:

*“The wheel has four quadrants that, ideally, rotate in sequence as the wheel moves. The first quadrant consists of questions, which may be triggered by problems or needs that require solutions. The questions prompt a search for possible answers or ideas, which must pass rigorous tests to see if they work. The results are then subjected to reflections, until we are certain we have identified the best solution. Only when the entire process is complete can we truly say that we have learned something. There are no short cuts.”*

Handy, 1994, p.48

Handy (1994) states that, although deceptively simple, this process ‘lies at the heart of individual growth and of corporate success’ (p49). In this research, team meetings changed in their focus from administrative issues to ‘incidental learning’ as Handy terms it. Team days also changed from an administrative focus to team building (to build ‘trust and togetherness’ in question 2) critical incident analysis (question 6) and going through the learning circle, focusing on one particular question (question 6). This ‘incidental learning’ incorporates many of the elements of action research and was therefore a familiar process for the team. Again, Handy (1994) cites this as a key element of learning organisations and stresses the difference between this and what he calls ‘accidental learning’:

*“The quest for knowledge or skills is only the beginning. Self-enlightenment needs to move on to incidental learning. Incidental learning is not the same as accidental learning... Incidental learning means treating every incident as a case study from which we can learn...Such incidents do not occur automatically: opportunities must be created for them to develop. For example, regular meetings of one’s group or cluster can be arranged to review recent critical events...It requires honesty with oneself and with others, a sense of togetherness and trust. Incidental learning is the organisations way to build in time for reflection, the final segment of the wheel.”*

Handy, 1994, p.53

This incidental learning is vital when dealing with divergent problems which, unlike convergent problems do not have ‘right answers’, but require the application of principles to a particular situation at a particular time.

This research and literature (Mount, 1987; O’Brien and Lovett, 1992) indicate that problems in the implementation of person centred planning tend to be divergent and therefore problem solving needs to be guided by explicit values. This emphasises the importance of the first question where values issues are made explicit. In practice, after each session of incidental learning the team needs to consider that this has told them about the service user and consequently is there anything that needs adding or taking away from the essential lifestyle plan.

## **11. CONCLUSION**

This research aimed to evaluate the process of implementing essential lifestyle plan within a team supporting two people with profound and multiple learning disabilities and from this to identify the implications for implementation within a service context. The outcomes for Kath and Derek and the team were very positive, however, difficulties were initially experienced in maintaining the activities and support identified in the plans and monitoring these. A further cycle of action research focused on embedding the essential lifestyle plans within the existing processes of the team (job consultations and team meetings) and into team days. The researcher found that the essential lifestyle plans provided direction for the team, and clarified the expectations of them. Through this research, and influenced by the 'Team Performance Model' (Drexler et al., 1994) six key questions were identified for teams who want to implement person centred plans and develop as a person centred team. These questions acknowledge a trilogy of learning that is required to support people to have the lifestyles they want to lead, with the support they require. The 'continual learning' was in three directions; what the team were learning about Kath and Derek and their community; the way they were implementing the plans; and how they worked together as a team. As Michael Smull states, the plan is not the outcome. Indeed, the plan is not the outcome, nor is it enough. The plan is a vehicle for recording our learning, and acting on this. The challenge for teams is to identify how this learning can be kept alive and meaningful and the six questions identified here provide a framework for addressing this.



**Table 3 : SUMMARY OF THE SECOND SPIRAL OF THE RESEARCH: EMBEDDING ESSENTIAL LIFESTYLE PLANNING INTO THE CULTURE OF THE TEAM**

<b>Aim</b>	<b>Method</b>	<b>Outcomes</b>
<b>1. To change team meeting to focus on essential lifestyle plans</b>	<ul style="list-style-type: none"> <li>• Facilitated the meetings</li> <li>• Mentored the team leader</li> <li>• Participant observation</li> </ul>	<ul style="list-style-type: none"> <li>• Two team meeting were held each month</li> <li>• The first, shorter, meeting focussed on administration issues</li> <li>• The second meeting focused on what had gone well and not gone as well the previous month in relation to implementation the essential lifestyle plans</li> <li>• Celebrating successes and setting actions for issues that had not gone well</li> <li>• Looking at what had been learned about Kath and Derek</li> <li>• Amending the plans as necessary</li> </ul>
<b>2. To develop team days to focus on on-going learning about Kath and Derek</b>	<ul style="list-style-type: none"> <li>• Facilitated the meetings</li> <li>• Mentored the team leader</li> <li>• Participant observation</li> </ul>	<ul style="list-style-type: none"> <li>• Three team days were held throughout the year.</li> <li>• Two days were spent learning about Kath and Derek in new ways, for example through using maps from Personal Futures Planning, and working on the area of relationships</li> <li>• One day was spend learning more about the way the team worked together and developing and amending the Essential Team Plan and mission statement for the team</li> <li>• Actions were set at each team day</li> <li>• Kath and Derek were supported to have new opportunities and meet more people more regularly (see Table 4 for more details)</li> <li>• These actions were reviewed during the monthly team meetings</li> </ul>
<b>3. To change job supervision to focus on essential lifestyle plans</b>	<ul style="list-style-type: none"> <li>• Mentored the team leader</li> </ul>	<ul style="list-style-type: none"> <li>• Job supervisions were focussed on:</li> <li>• how well the team member was doing implementing the plans</li> </ul>

		<ul style="list-style-type: none"> <li>• problem solving any difficulties</li> <li>• identifying what support they required</li> <li>• reviewing any issues arising from the Essential Team Plan, to improve communication and working within the team</li> <li>• administration issues</li> </ul>
<b>4. To evaluate the process and outcomes</b>	<ul style="list-style-type: none"> <li>• Semi-structured interviews</li> <li>• Documentary analysis</li> <li>• Participant observation</li> </ul>	<ul style="list-style-type: none"> <li>• Outcomes for Kath, Derek and the team are outlined in Table 4</li> </ul>

**Table 4: FURTHER CHANGES FOR KATH AND DEREK, AND THE TEAM AFTER EMBEDDING ESSENTIAL LIFESTYLE PLANNING INTO THE CULTURE OF THE TEAM**

<b>FURTHER CHANGES FOR KATH AND DEREK</b>	<b>FURTHER CHANGES FOR THE TEAM</b>
<p style="text-align: center;"><i>Seeing more people, more regularly</i></p> <ul style="list-style-type: none"> <li>On one of the team days the team focussed on relationships and identified how the team was going to support existing relationships and enable Kath and Derek to develop new relationships. The number of people Kath and Derek saw, who were not paid to be with them, doubled as a result of this.</li> </ul>	<p style="text-align: center;"><b>Improved meetings</b></p> <ul style="list-style-type: none"> <li>The team generally found that re-structuring the team meetings made it easier to keep the focus on the essential lifestyle plans.</li> <li>People commented that the meetings were more interesting now and they appreciated the approach of continually trying new things, reflecting on what had been working and having an opportunity to discuss issues.</li> </ul> <p style="text-align: right;">Lucy</p>
<p style="text-align: center;"><b>Trying new activities in the community</b></p> <p>Kath and Derek were given opportunities to try new activities. In one month the new activities that Kath tried were:</p> <ul style="list-style-type: none"> <li>Jacuzzi</li> <li>Sauna</li> <li>Thai food</li> </ul> <p>For Derek these included:</p> <ul style="list-style-type: none"> <li>Kite flying</li> <li>Using a computer</li> </ul>	<p style="text-align: center;"><b>Working better together with clearer responsibilities</b></p> <ul style="list-style-type: none"> <li>Work spread across the team and not left to key workers evenly throughout the team.</li> <li>Lucy saw this as having a very positive effect on the way that the team worked together:  <i>“The team works much better together - in the past keyworkers got left to do everything - now it’s the team working together”.</i></li> </ul> <p style="text-align: right;">Lucy</p> <ul style="list-style-type: none"> <li>Setting goals clarified people’s responsibilities:  <i>“We tried out what worked and what did not. How else can you know what</i></li> </ul>

	<p style="text-align: center;"><i>people may enjoy unless you try?...It's much more interesting now - you know what to do and make sure it happens.</i></p> <p style="text-align: right;">Joan</p>
	<p>Improved supervision</p> <ul style="list-style-type: none"> <li>• Job supervision focused on how the person was getting on supporting Kath and Derek, and what support (e.g. training) they required to do that more effectively.</li> <li>• Personal development and administration issues are important but an attempt was made to re-establish these within the framework of how well the person was following the plan and working for Kath and Derek rather than in isolation.</li> </ul>
	<p>Clearer expectations and more consistent team working</p> <ul style="list-style-type: none"> <li>• The Essential Team Plan was seen by the team as a useful tool for reviewing how the team worked together; getting more consistency and enabling team members to speak up more easily about issues:</li> </ul> <p style="text-align: center;"><i>“The Essential Team Plan is definitely a living plan..it's definitely ongoing for the people who were involved in it”.</i></p> <p style="text-align: right;">Lucy</p> <ul style="list-style-type: none"> <li>• Some individual team members reported that it gave them more confidence to deal with issues with individuals:</li> </ul> <p style="text-align: center;"><i>“Sarah felt that she could tackle Andy over issues as a result of the team plan. She is definitely more confident in team meetings now”.</i></p> <p style="text-align: right;">Anne</p>

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