

Supporting Person-Directed Living Through Planning

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MAPS (Multidimensional Assessment of Providers and Systems) is a research program to inform the assessment of services and supports for adults with intellectual/developmental disabilities in Ontario, Canada. MAPS (www.mapsresearch.ca) is supported by a research grant from the Government of Ontario's Ministry of Community and Social Services.

Enhanced social inclusion, choice and independence are outcomes central to recently passed legislation in Ontario – The Services and Supports to Promote Social Inclusion of Persons with Developmental Disabilities Act. The goal of MAPS is to achieve a consensus of what is meant by social inclusion, choice and independence and how to best capture information about these outcomes.

MAPS is a provincial interdisciplinary team of researchers working with individuals with intellectual/developmental disabilities, their families, service providers, government representatives and researchers in other provinces and countries. The research team is led by Dr. Hélène Ouellette-Kuntz (Department of Public Health Sciences, Queen's University) and is composed of Dr. Virginie Cobigo (School of Psychology, University of Ottawa), Dr. Robert Hickey (School of Policy Studies, Queen's University), Dr. Rosemary Lysaght (School of Rehabilitation Therapy, Queen's University), Dr. Yona Lunskey (Department of Psychiatry, University of Toronto, and Research Head of the Dual Diagnosis Program at the Centre for Addiction and Mental Health), and Dr. Lynn Martin (Department of Health Sciences, Lakehead University)

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Executive Summary

The *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008*, has identified person-directed planning (PDP) as a service to help adults with intellectual and developmental disabilities (IDD) and their natural supports identify a life vision and goals, as well as identify the appropriate supports and services needed to help them work toward those goals. Over the last three years, we undertook various activities to develop a better understanding of PDP and identify a set of indicators that could inform on the quality of the planning process.

Through our work, we came to understand PDP as more than planning, planning meetings, or plans. We think of PDP as a way of supporting persons with IDD that brings us one step closer to fulfilling the aspirations of ‘normalization’ put forward so many years ago – it is a way of promoting **person-directed living**. Person-directed living is about the **redistribution of power** from the system to adults with IDD and natural supports (i.e., family, friends); the **relationships** between the people involved in planning; and the **communities** that are created.

This work has revealed that the shift toward person-directed living requires that the **right people** be involved in planning, that the **right attitudes** about how to best support adults with IDD are in place, and that the **right actions** are taken to support the achievement of goals. A total of 75 indicators have been identified to help assess and monitor the extent to which planning teams, agencies, the developmental services system, and the environment facilitate the shift toward person-directed living. The data needed to derive these indicators will require the use of diverse methods of data collection and various informants.

Some of the required data already exists within agencies and the Ministry. In fact, capacity exists to begin assessing and monitoring 24 of the proposed PDP-related indicators; these are focused on the people involved in planning and relevant actions taken by agencies and the system. However, the perspectives of adults and their natural supports are missing within existing data holdings. In particular, limited data exists on whether the right people are involved in planning, and no data exists related to the attitudes and actions of planning team members, or within the environment in which planning occurs. As a result new data collection efforts, preferably undertaken by a third party, are required; without it the voice of the very people we aim to empower is lost.

Having used the term PDP in the *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008*, the Ministry has taken an important step in shifting toward person-directed living. Given this commitment to shifting power to persons with IDD, as well as the extent to which relevant information is already being collected within the system, the Ministry is well-positioned to implement a standardized way of collecting information on how planning teams, agencies, the system, and the environment promote and facilitate person-directed living in Ontario.

Introduction

In Ontario, there have been shifts over the last few decades in *who* has legislative responsibility for providing supports to persons with intellectual and developmental disabilities (IDD) – i.e., from the Ministry of Health and Long-term Care to the Ministry of Community and Social Services (MCSS), and *where* these services are provided – i.e., from institutions to the community, including an increased reliance on generic services and the broader community for supports.

There have also been shifts in *how* decisions are made regarding which services and supports are offered to or accessed by adults with IDD. In particular, approaches to planning services have shifted from a more prescriptive approach to one that is based on what is important and meaningful to the person. Individualized planning has become common practice in the developmental services system – agency staff work with adults and their natural supports (i.e., family, friends, significant other, neighbours, members of the community) to determine which available services can best support them.



*“People come to life when they make contact
with someone who works actively and faithfully
to understand what they want to say.”
(O’Brien & O’Brien, 2007, p15)*



Today, the *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008*, identifies person-directed planning (PDP) as a service that helps persons with IDD and natural supports to identify a life vision and goals, as well as identify the appropriate supports and services needed to help the person work toward those goals.

The aim of this study was to support the developmental services system in its move toward PDP approaches by developing a more in-depth understanding of PDP and identifying a set of relevant indicators to measure the extent to which this shift is being supported. This report provides information on:

- 1) the activities and approaches taken over the course of the study;
- 2) a description of the shift toward person-directed living and the role of planning in supporting that shift; and
- 3) a set of planning-related indicators of the extent to which support for the movement toward person-directed living is present within planning teams, agencies, the system, and the environment.

Activities and Approaches

The different approaches used to inform our thinking about PDP are briefly described below.

Literature reviews

A systematic review of the literature published in English between 2000 and 2010 was conducted to better understand what was meant by person-centered or person-directed planning. The findings from the literature review were reported by Martin and Ouellette-Kuntz (2011). It should be noted that review of relevant materials (from both the scientific and grey literature) continued throughout the course of the project.

A systematic review of the literature was also conducted to gain insights about how planning has been evaluated or measured; literature published in English between 2000 and 2011 was reviewed. These findings are reported in Martin, Ouellette-Kuntz, Cobigo and Ashworth (2012a).

Agency survey

Developmental services agencies in Ontario were surveyed to better understand what planning approaches and practices were used based on the various approaches previously identified (see Martin and Ouellette-Kuntz, 2011). This survey helped identify the planning approaches used in agencies across the province, as well as what planning-related data was being – or could easily be collected by agencies. A total of 156 agencies participated, representing 72% of eligible agencies. The findings from the agency survey are described by Martin, Ouellette-Kuntz, Cobigo and Ashworth (2012b) and Martin, Ashworth and Ouellette-Kuntz (2012).

Case studies of planning teams

In-depth interviews were conducted with planning teams from across the province to better understand the planning experience of adults with IDD, natural supports, independent planners or facilitators, and agency staff. In order to represent the planning reality, attention was given to include teams with various compositions. For example, teams where the person with IDD required minimal vs. 24-hour support, where natural supports were and were not involved, and teams in which paid staff were and were not involved. A total of 47 people from eight (8) teams were interviewed. Findings are reported in Martin, Ouellette-Kuntz, & Walker (2013).

Stakeholder engagement

Over the course of the project, the research team actively engaged with a number of stakeholders for both input into and feedback on research activities and findings. In particular, the PDP projects were discussed during *consumer consultations* in Kingston, Toronto, and Thunder Bay in June 2011; *consultations with local advisory committees*, comprised of family members, service providers, and decision-makers, in Kingston, Toronto, and Thunder Bay in June 2011; and during a *consultation with developmental services agencies*, as part of a larger consultation with the Ministry of Community and Social Services in Toronto in May 2012. These consultations are described elsewhere (for example, in Ouellette-Kuntz, 2012).

Person-Directed Living: The Next Big Shift for Planning

Since the works of Nirje (1969) and Wolfensberger (1972), there has been a growing recognition of the right of persons with IDD to live ‘normal’ lives and to make their own choices. This realization also sparked the first “big shift” in supports for persons with IDD – from institution-based to community-based supports. Around this time, responsibility for services to persons with IDD in Ontario shifted from the Ministry of Health and Long-term Care to the Ministry of Community and Social Services which passed the *Developmental Services Act* in 1974 (this law was replaced with the Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008 in July 2011; Ministry of Community and Social Services, 2012). The *Developmental Services Act* committed the government to improving the lives of persons with IDD through the development of community-based supports that would enable persons with IDD to have a stronger say in how they lived their lives.

However, the presence of an IDD often affects a person’s independence, ability to make self-determined choices, and participation in community activities. As a result, various approaches have emerged to support individuals to live their best life. In fact, between 1979 and 1992, person-centered approaches to planning – called person-centered planning, or PCP, emerged as a way to plan for supports based on what is important or meaningful to the person (O’Brien & O’Brien, 2000). PCP is based on individualized planning techniques and tools, but results in an entirely new way of seeing and of working with the person and his/her natural supports (Sanderson, 2000). By and large, PCP has become common practice in the social and developmental services supporting persons with IDD. Person-centered approaches are also used in other populations, for example, older adults (see McCormack, 2004) and persons with mental illness (see Borg, Karlsson, Tondora, & Davidson, 2009).

While there is no universally accepted definition of PCP and no single approach to planning, there is a set of values that underpin the process. A number of principles (Mansell & Beadle-Brown, 2004), key features (Sanderson, 2000), and hallmark features (Schwartz, Jacobson, & Holburn, 2000) of PCP have been identified, touching on aspects related to the person with IDD, the planning team, the planning process, the plan, and the service provider. From these, Martin and Ouellette-Kuntz (2011) proposed a set of 14 core elements of a person-centered approach (see Figure 1 below).

Since the emergence of PCP, a number of somewhat inter-related approaches have emerged, most coming from its formative period (i.e., between 1979 and 1992) (O’Brien & O’Brien, 2000) – many of which are still in use today. In Ontario, more than a third of developmental service agencies surveyed reported using *Personal Outcome Measures* (Council on Quality and Leadership in Supports for People with Disabilities, 1999), *Getting to Know You* (Brost & Johnston, 1982), and *Essential Lifestyle Planning* (Smull & Harrison, 1992) approaches to planning, and at least one quarter use *Planning Alternative Tomorrows with Hope* (Pearpoint, O’Brien, & Forest, 1991) and the *McGill Action Planning System* (Forest & Lusthaus, 1989; Vandercook, York, & Forest, 1989) (Martin, Ashworth, & Ouellette-Kuntz, 2012; Martin, Ouellette-Kuntz, Cobigo, & Ashworth, 2012b). Further, about 60% of agencies surveyed

indicated that they had developed their own planning approach or tool (i.e., a “home-grown” approach), and the majority used a blended approach to planning in that they used one or more approaches in their planning for a single individual (Martin, Ashworth, & Ouellette-Kuntz, 2012; Martin, Ouellette-Kuntz, Cobigo, & Ashworth, 2012b). Further, the vast majority of agencies surveyed reported that they collect planning-related information on all adults with IDD supported (Martin, Ouellette-Kuntz, Cobigo, & Ashworth, 2012b). Consequently, Ontario’s developmental services system is well-positioned to implement a standardized way of collecting information related to planning practices.

Figure 1. Core elements of a person-centered approach



While PCP is common practice in developmental services, the research on its effectiveness and outcomes remains limited. Through the relatively small number of studies that have been conducted, PCP has been shown to be related to quality of life (see the review by Claes, Van Hove, Vandevelde, van Loon, & Schalock, 2010), social networks, community involvement, contact with friends, contact with family, choice, autonomy, relationships, and satisfaction (Cook & Abraham, 2007; Claes et al., 2010; Holburn, Jacobson, Schwartz, Flory, & Vietze, 2004; Robertson et al., 2006), as well as to long-term satisfaction with both planning processes and outcomes (Everson & Zhang, 2000). Further, O’Brien and O’Brien (2000) have credited PCP with the ability to increase the respect afforded to persons with IDD.

However, some have questioned the extent to which PCP has led to ‘real’ inclusion (Clement & Bigby, 2009; Robertson et al., 2006). While a person-centered approach seeks to help the person with IDD expand his or her social network, limited communication and social skills sometimes hinder the development of meaningful friendships. For some, it is difficult to establish the very circle of support that is essential to PCP (see review by Claes et al., 2010), to

know how to best involve parents in planning (West, Kregel, Hernandex, & Hock, 1997), and to involve people other than parents and paid agency staff in planning (Everson & Zhang, 2000). During consultations with our local advisory committees and representatives from developmental services agencies over the course of the research, many have noted the inherent conflict experienced by direct support workers between respecting the person's goals and choices and ensuring his/her safety. A support worker may find it difficult to support choices and goals when these involve some degree of risk – for example, poor food choices by a person with diabetes, the decision to live independently before having all of the necessary skills to do so safely, or the choice to be friends with known criminals. Another source of conflict arises when the person's goals or support needs go beyond the capacity of the agency providing direct support – for example, insufficient numbers of staff or resources may prevent the development of an appropriate option. Because of this, some have suggested that planning take place outside the agency providing direct support, or outside of the developmental services system altogether (Joseph Rowntree Foundation, 2006). However, there is no scientific evidence comparing the individual outcomes of planning led by agency staff to those of planning led by independent, unencumbered facilitators.

As stated earlier, understanding of how best to support persons with IDD has changed significantly over the last few decades. In 2004, the Ontario Ministry of Community and Social Services furthered its commitment to community-based living by announcing the closure of the three remaining specialized institutions for adults with IDD. Through careful thought and planning (see Martin & Ashworth, 2010), all adults were living in the community by March 31, 2009. Around the same time, this Ministry introduced the *Accessibility for Ontarians with Disabilities Act* (2005), to further support the inclusion of persons with disabilities. In 2008, commitment to social inclusion for persons with IDD in particular was further supported through the *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act*.


**PDP is a service
“to assist persons with
developmental disabilities
in identifying their life
vision and goals and finding
and using services and
supports to meet their
identified goals with the
help of their families or
significant others
of their choice”**
(*Services and Supports to Promote
the Social Inclusion of Persons
with Developmental Disabilities
Act, 2008, part 1, section 4.2*)

It is in the *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act* (2008) that the Ministry legislated the use of person-directed planning (PDP) as a service “to assist persons with developmental disabilities in identifying their life vision and goals and finding and using services and supports to meet their identified goals with the help of their families or significant others of their choice” (part 1, section 4.2).

The term PDP is not widely used in the field, and is virtually non-existent in the scientific literature. Having used the term PDP in this legislation, the province has taken an important step in shifting toward persons with IDD having more control over their lives – in shifting toward **person-directed living**.

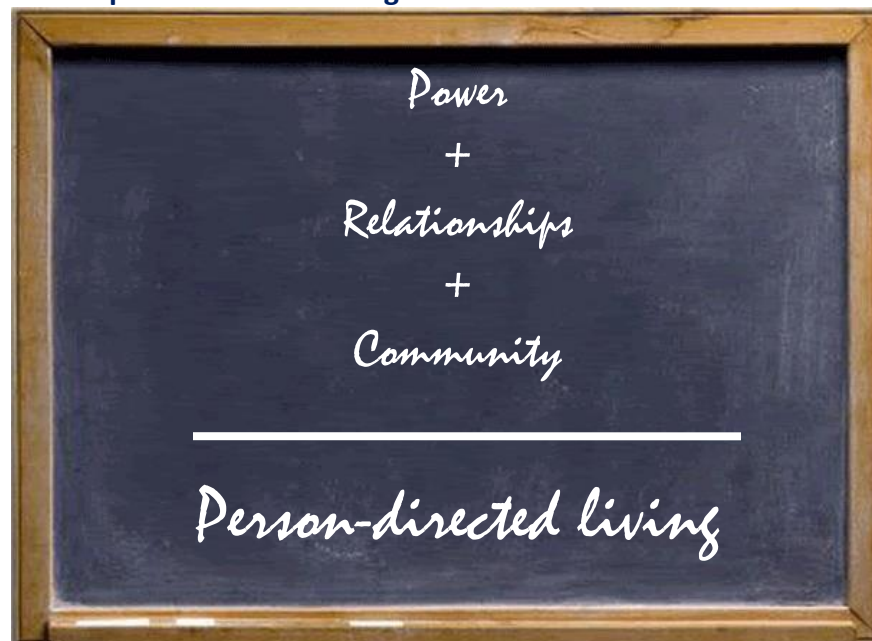
Supporting the Shift toward Person-directed Living

Person-directed living is the next big shift in terms of understanding how best to support persons with IDD. A person-directed life is one that is led by the person, who, with natural supports, makes decisions about what that life should look like and what supports are needed. In fact, person-directed living represents the culmination of the aspirations of 'normalization', started so many years ago (Nirje, 1969; Wolfensberger, 1972).

Person-directed living does not preclude the involvement of the service system in the life of the person with IDD. Rather, it promotes the use of appropriate supports – which may come from the community (i.e., generic services) or from the developmental services system (i.e., specialized supports), and be delivered by natural (i.e., family, friends) or paid supports (i.e., developmental services staff).

Person-directed living is about the **redistribution of power** from the system to individuals with IDD and natural supports (Joseph Rowntree Foundation, 2006; Rasheed, Fore, & Miller, 2006; Sanderson, 2000). They drive the planning process by setting the goals and deciding how best to achieve them. It is about **relationships** – how people come together to help the individual plan for his/her life, and figure out how best to help him/her achieve those goals. It is also about how the person is supported to maintain meaningful relationships, as well as how he/she is supported to create new ones. Therefore, person-directed living is also about **community**. The person with IDD is not merely 'present' in the community; he/she is part of a larger community that values the person and his/her contributions.

Figure 2. Elements of person-directed living



Making it happen

While there is a real desire for persons with IDD to have more power or control over their lives, this will likely not happen on its own. The environment in which the person lives, the system and agency (or agencies) that provide support, as well as the individuals who assist the person all play a role in the shift toward person-directed living (see Figure 3).

Essential to the shift toward person-directed living is the **environment**. For adults with IDD to live a person-directed life, they must be included in the community and in society in general. Here, the goal is for more than ‘presence’ in the community, it is to build a community in which the person with IDD is a valued, contributing member. Therefore, the environment must be one where persons with IDD are *viewed as valued citizens* by members of the larger community; have *opportunities to perform respected and expected social roles*, and are *recognized as being able* to perform those roles; and have *access to public goods and services* (Cobigo, 2012).

Also important in the shift toward person-directed living is the extent to which the developmental services **system** supports this shift. For persons with IDD to live a person-directed life, *policies* must facilitate (or at least, not hamper) the redistribution of power to persons with IDD and natural supports. Examples include policies that ensure sufficient and appropriate funding to persons with IDD and assist them and their natural supports to have control of those funds (Joseph Rowntree Foundation, 2006), or ones that facilitate cooperation and coordination with other relevant Ministries. The system must also be *responsive* to the needs – and changing needs, of persons with IDD. The system must also help create an inclusive environment through *legislation*. The *Accessibility for Ontarians with Disabilities Act* (2005) and the *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act* (2008) are examples of such efforts within Ontario.

Figure 3. Supporting person-directed living



Developmental services **agencies** also play a role in the shift toward person-directed living. In particular, agency policies and staff practices must support the redistribution of power to persons with IDD and natural supports. Staff must be *well-trained* in person-centered thinking and practices. Also key is that the *organizational culture* itself must be person-centered (Stirk & Sanderson, 2012). The importance of a person-centered organizational culture and related indicators are described in Hickey (2013), and are therefore not presented in this report.

Those who support the person with IDD – either informally (i.e., natural supports) or formally (i.e., paid supports), are key players in the shift toward person-directed living. *Natural* and paid supports (Dowling, Manthorpe, & Cowley, 2007; Mansell & Beadle-Brown, 2004; Martin & Ouellette-Kuntz, 2011; Sanderson, 2000; Schwartz, Jacobson, & Holburn, 2000) *who know the person well* (Sanderson, 2000) come together to help the person plan for his/her life, and figure out how best to help him/her achieve goals. Given the importance of mobilizing natural supports to assist the individual (Mansell & Beadle-Brown, 2003; Sanderson, 2000; Schwartz, Jacobson, & Holburn, 2000), it is important that the people on the planning team have the *capacity* to support the individual in some way (e.g., emotionally, instrumentally). This group of individuals, *who are important to and chosen by the person with IDD* (Martin & Ouellette-Kuntz, 2011; Martin, Ouellette-Kuntz, & Walker, 2013; Sanderson, 2000), are referred to as the **planning team**.

When this group comes together, however, it is about more than ‘planning’, ‘planning meetings’, or ‘the plan’ – though these are also important. Person-centered thinking and practices among members of the planning team are essential. In particular, the planning team must *listen* (Martin, Ouellette-Kuntz, & Walker, 2013; Rasheed, Fore, & Miller, 2006; Sanderson, 2000) to what the person is communicating, *promote and facilitate choice-making* and *respect his/her choices* (Martin & Ouellette-Kuntz, 2011; Martin, Ouellette-Kuntz, & Walker, 2013; Schwartz, Jacobson, & Holburn, 2000), work *collaboratively* with one another (Martin & Ouellette-Kuntz, 2011; Martin, Ouellette-Kuntz, & Walker, 2013), be *accountable* to the person (Martin & Ouellette-Kuntz, 2011), and *committed* to supporting him/her in achieving goals (Martin & Ouellette-Kuntz, 2011; Martin, Ouellette-Kuntz, & Walker, 2013; Schwartz, Jacobson, & Holburn, 2000).

The plans created *focus on the person’s strengths, abilities, and aspirations* (Mansell & Beadle-Brown, 2004; Martin & Ouellette-Kuntz, 2011; Martin, Ouellette-Kuntz, & Walker, 2013; Sanderson, 2000), *identify the needed supports* (within and outside of the developmental services system) that will be *implemented* to help the person achieve his/her goals (Beadle-Brown, 2006; Mansell & Beadle-Brown, 2004; Martin & Ouellette-Kuntz, 2011; Sanderson, 2000; Schwartz, Jacobson, & Holburn, 2000; O’Brien & O’Brien, 2000). The planning team engages in *continuous evaluation* of actions and progress toward goals (Martin & Ouellette-Kuntz, 2011; Martin, Ouellette-Kuntz, & Walker, 2013), and is *responsive* to the person’s changing wants and needs (Martin & Ouellette-Kuntz, 2011; Martin, Ouellette-Kuntz, & Walker, 2013; Sanderson, 2000). In implementing plans, the planning team must also engage in *building community capacity* to meet the needs of the person (Albertson, Whitaker, & Perry, 2011; Sanderson, 2000; O’Brien & Lovett, 1992). Through their actions, planning teams help *foster*

connections (Holburn & Cea, 2007) with the larger community by supporting the person in maintaining meaningful relationships and creating new ones.

Measuring whether it is happening

The data needed to measure both the concrete and complex ways in which planning teams, agencies, the system, and the environment support the shift toward person-directed living will require the use of **diverse methods of data collection** (i.e., quantitative and qualitative) and **various informants** (i.e., persons with IDD, natural supports, staff).

In some instances, the information needed **already exists and is readily available**. Martin, Ouellette-Kuntz, Cobigo and Ashworth (2012) reported that much of the information or data related to planning teams and practices is already collected by a large proportion of developmental services agencies across the province. Where information was not already being collected, most agencies indicated that this could be done with little to no difficulty. In proposing organization-related indicators, Hickey (2013) provides information on the types of data collected by agencies related to their policies and practices. Further, some of the information or data is readily available through the Ministry of Community and Social Services. For example, the Developmental Services Ontario (DSO) organizations collect information on requests for PDP from persons with IDD and families they assess. As a result, it is believed that the developmental services system is well-positioned to implement a standardized way of collecting relevant data.

Some indicators are based on information that **already exists but requires modification in how it is collected, analysed, or interpreted**. For example, it may be that agencies collect the same information in a variety of different ways (existing data, modify collection); developmental services organizations (DSOs) collect a piece of information at the individual level that is not easily aggregated (existing data, modify analysis); or that DSOs and the Ministry each collect a piece of information that are more informative when combined (existing data, modify interpretation).

However, some indicators will require **new data collection** efforts. For example, interviews and/or surveys of adults with IDD and natural supports will be required to obtain information on their experiences and perspectives. Understanding the experiences of the people involved is essential to determine the extent to which the shift toward person-directed living is being supported, and achieved.

While some of the indicators are based on yes/no or answers related to quantities or selection from a list, others are based on questions directed at adults with IDD and natural supports that will require a standardized protocol to prompt and subsequently code open-ended responses. Based on the experiences of other jurisdictions – for example, in the Netherlands (<http://buntinx.org/english>) and the United States (<http://www.hsri.org/project/national-core-indicators/people/>), it is important to consider using a **third party** (i.e., non-service provider or funder) to collect and analyze this type of data.

It should be noted that some of the indicators would be more informative if a timeframe were specified – for example, indicators related to responsiveness to needs. However, discussions are needed with the MCSS and stakeholder groups to determine the most appropriate timeframes for these indicators.

Right People, Right Attitudes, Right Actions

Person-directed planning (PDP) is a service that is supported in Ontario by the Ministry of Community and Social Services to help adults with IDD, planning teams, and agencies promote the shift toward person-directed living. To maximize its success, PDP necessitates the **right people**, the **right attitudes**, and the **right actions** (Figure 2).

Figure 4. Right People, Right Attitudes, Right Actions



In this section, summary tables of **actionable** indicators that are **meaningful**, **practical**, and **conceptually sound** to measure the extent to which the right people, the right attitudes, and the right actions are present within planning teams, agencies, system, and environment and support the shift toward person-directed living are presented. The suggested format and source for acquiring the data are also provided for each indicator.

The full list of indicators with potential (or sample) questions for each indicator can be found in the Appendix.

The Right People

Given that person-directed living is about redistribution of power to persons with IDD and their natural supports, indicators (see Table 1) are needed to identify the extent to which the right people are involved.

The right people are **planning team** members who:

- ✓ are chosen by the person;
- ✓ know the person well;
- ✓ include natural supports; and
- ✓ have the capacity to support the person in some way.

Table 1. Indicators related to the Right People

Levels	Indicators	Format	Source
Planning team	% of adults/families who report that the adult chose the members of his/her planning team ¹	New survey or interview	Third party
	% of adults/families who report that planning team members know the adult well	New survey or interview	Third party
	% of adults/families who report that planning team members have the capacity to support the adult	New survey or interview	Third party
	% of planning teams that include natural supports	Existing records, Modify collection	Agencies
	% of planning team members that are natural supports	Existing records, Modify collection	Agencies

¹Note that while 'adults' and 'families' are grouped in the summary tables presented in this section, these actually refer to two distinct indicators based on information from adults with IDD and families, respectively. These indicators are shown separately in the table provided in the Appendix.

The Right Attitudes

Person-directed living is about adults with IDD having more power and control over their own lives; for this to happen, all people have to believe that this is possible. Therefore, indicators (see Table 2) are needed to determine the extent to which the right attitudes are present among both the people involved in planning (i.e., the planning team), and the environment in which planning occurs.

Planning teams with the right attitude:

- ✓ focus on the adult's strengths, abilities, and aspirations;
- ✓ respect the adult's choices; and
- ✓ are committed to helping the adult achieve his/her goals over the long-term.

The right attitude is present in the **environment** when:

- ✓ community members value persons with IDD; and
- ✓ community members recognize that adults with IDD are able to perform a variety of social roles.

Table 2. Indicators related to the Right Attitudes

Levels	Indicators	Format	Source
Planning team	% of adults/families who report that planning team members focus on what the adult wants for his/her life	New survey or interview	Third party
	% of adults/families who report that planning team members focus on the adult's strengths and abilities	New survey or interview	Third party
	% of adults/families who report that planning team members respect the adult's choices	New survey or interview	Third party
	% of adults/families who report that planning team members are committed to supporting the adult	New survey or interview	Third party
Environment	% of adults/families who report that the adult is valued in the community	New survey or interview	Third party
	% of adults/families who report that the community recognizes the adult's abilities	New survey or interview	Third party

The Right Actions

If people with IDD are to take more control over their own lives, all those involved in planning have to do what they can to make it happen. Indicators (see Table 3) are needed to show the extent to which planning teams, agencies, the system, and the environment are engaged in the right actions to facilitate person-directed living.

Planning teams engaged in the right actions when they:

- ✓ actively listen to what the adult is communicating;
- ✓ promote and facilitate choice-making;
- ✓ work collaboratively with one another;
- ✓ are accountable to the adult;
- ✓ build community capacity;
- ✓ foster connections;
- ✓ identify the needed supports within and outside of the developmental services system;
- ✓ engage in continuous evaluation of actions and progress toward goals; and
- ✓ are responsive to changes in the adult's wants and needs.

Agencies are engaged in the right actions when they:

- ✓ engage in person-centered training activities

The **system** engages in the right actions when it:

- ✓ develops policies and legislation that support person-directed living.

Then **environment** is engaged in the right actions when:

- ✓ adults with IDD are provided with opportunities to experience valued and expected social roles; and
- ✓ adults with IDD have access to public goods and services.

Table 3. Indicators related to the Right Actions

Levels	Indicators	Format	Source
Planning teams	% of adults/families who report that planning team members listen to the adult	New survey or interview	Third party
	% of adults/families who report that planning team members promote choice-making	New survey or interview	Third party
	% of adults/families who report that planning team members facilitate choice-making	New survey or interview	Third party
	% of adults/families who report that the planning process has increased opportunities for making choices	New survey or interview	Third party
	% of adults/families who report that planning team members work collaboratively with one another	New survey or interview	Third party
	% of adults/families who report that planning team members are accountable to the adult	New survey or interview	Third party
	% of adults/families who report that planning team members engage in building community capacity	New survey or interview	Third party
	% of adults/families who report that planning team members foster connections	New survey or interview	Third party
	% of adults/families who report planning process has led to more community connections	New survey or interview	Third party
	% of adults/families who report that planning team members identify the needed supports within and outside of the developmental services system to help the adult achieve his/her goals	New survey or interview	Third party
	% of adults/families who report that planning team members engage in continuous evaluation of actions and progress	New survey or interview	Third party
	% of adults/families who report that planning team members are responsive to the adult's changing wants and needs	New survey or interview	Third party

Table 4. Indicators related to the Right Actions (CONTINUED)

Levels	Indicators	Format	Source
Agency	% of agencies that provide training in person-centered thinking and practices	Existing records, Modify collection	Agencies
	% of agencies that provide person-centered training to all levels of staff	Existing records, Modify collection	Agencies
	% of agencies that provide person-centered training to all staff	Existing records, Modify collection	Agencies
	% of agencies that identify any element of person-centered thinking as the most important focus of training	New survey	Agencies
	% of agencies for which all elements of person-centered thinking have the highest ratings of importance	New survey	Agencies
	% of agencies that focus training most heavily on elements of person-centered thinking	New survey	Agencies
	% of agencies that provide planning-related training to adults with IDD	Existing records, Modify collection	Agencies
	% of adults with IDD who have received planning-related training from agencies in the last 12 months	Existing records, Modify collection	Agencies
	% of agencies that provide planning-related training to family and community members	Existing records, Modify collection	Agencies
	Ratio of family and community members who have received planning-related training from agencies in the last 12 months to adults supported	Existing records, Modify collection	Agencies
System	% adults entering the system who already have a person-directed plan	New data collection	DSO MCSS
	% of adults/families entering the system who request information about PDP	New data collection and Existing records, Modify collection	DSO MCSS
	% of adults/families already in service who request information about PDP	Existing records, Modify collection	DSO MCSS
	% of adults/families entering the system who request PDP as a service	Existing records, Modify collection	DSO MCSS
	% of adults/families already in service who request PDP as a service	Existing records, Modify collection	DSO MCSS
	% of adults/families entering the system who request and receive PDP as a service	Existing records, Modify collection	DSO MCSS
	% of adults/families already in service who request and receive PDP as a service	Existing records, Modify collection	DSO MCSS
	% of adults/families entering the system who request PDP as a service after requesting information about PDP	Existing records, Modify collection	DSO MCSS
	% of adults/families already in service who request PDP as a service after requesting information about PDP	Existing records, Modify collection	DSO MCSS

Table 5. Indicators related to the Right Actions (CONTINUED)

Levels	Indicators	Format	Source
System (Continued)	% of adults/families entering the system who request individualized funding	Existing records, Modify collection	DSO MCSS
	% of adults/families already in service who request individualized funding	Existing records, Modify collection, and interpretation	DSO MCSS Agencies
	% of adults/families entering the system who receive individualized funding	Existing records, Modify collection	MCSS
	% of adults/families already in service who receive individualized funding	Existing records, Modify collection	MCSS
	% of adults/families entering the system who request and receive individualized funding	Existing records, Modify collection	DSO MCSS
	% of adults/families entering the system who request and receive individualized funding	Existing records, Modify collection	DSO MCSS
	Number of transfer payment agencies receiving requests for unencumbered independent facilitation	New survey	Agencies
	Number of transfer payment agencies involved in unencumbered independent facilitation	Existing records, Modify collection	Agencies
Environ- ment	% of adults/families who report that the adult has opportunities to experience valued and expected social roles	New survey or interview	Third party
	% of adults/families who report that the adult has access to public goods and services	New survey or interview	Third party

Moving forward

Understanding of how best to support persons with IDD has changed significantly over the last few decades – for example, from institutional to community living. The approach taken to plan for the supports needed by persons with IDD to both live their everyday life and to achieve their goals has also changed – from planning *for* to planning *with*. With the introduction of the *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act (2008)*, the Ministry has further changed the way services and supports are planned by legislating the use of person-directed planning (PDP). In Ontario, we are moving beyond planning *with*, toward planning **by**. PDP is meant to provide persons with the support they need to identify their life vision and goals, and with the help of those who are important to them, to then identify the needed services and supports and where best to get them. PDP, therefore, plays an important role in a much larger shift that is occurring toward persons with IDD having more control over their lives – a shift toward **person-directed living**.

Person-directed living is about the *redistribution of power* from the system to individuals with IDD and natural supports; the *relationships* between individuals with IDD and the people who come together to support them; and creating *communities* in which persons with IDD are not merely present, but considered valued members. While there is a real desire for persons with IDD to have more power or control over their lives, a concerted effort will be required for this to be realized. PDP does not happen in isolation – it involves adults with IDD, their planning teams, the agencies that may be providing supports and services, the developmental services system, as well as the environment in which they live. The data needed to measure both the concrete and complex ways in which each of these support the shift toward person-directed living will require the use of diverse methods of data collection and various informants.

A total of 75 indicators are proposed to reveal the extent to which the shift toward person-directed living is being supported in the context of PDP, based on information from adults (23), families (23), agencies (14), and the Ministry (15). Some of the data needed to derive these indicators already exists within agencies and the Ministry. In particular, information exists to derive two (2) indicators related to having the right people involved in planning, and 21 indicators related to agencies and the system engaging in the right actions to maximize the success of PDP. Therefore, the developmental services system is well-positioned to standardize data collection efforts, and to **quickly begin using these 23 indicators**.

However, some very valuable information is not currently available – **the perspectives of adults with IDD and their natural supports are missing**. Limited data exists on whether the right people are involved in planning, and no data exists related to the attitudes and actions of planning team members, or within the environment in which planning occurs. As a result new data collection efforts, preferably undertaken by a third party, are required. Without these additional data, understanding how well the shift toward person-directed is supported – or how best to support it, and the extent to which the right people, who have the right attitudes, and who engage in the right actions are involved, is not possible.

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Appendix A: Proposed list of indicators and questions

Note that for indicators relying on survey or interview data (i.e., from the person and/or his or her family), a positive answer to the question (or any of the questions, if multiple questions) related to the indicator results in a positive measure on the indicator.

A1: Indicators related to the Right People: Planning Teams

Indicators	Questions	Format	Source
% of adults who report they chose the members of their planning team	Who chose the people on your team? Was it you?	New survey or interview	Third party
% of families who report that the adult chose the members of his/her planning team	Did the adult get to choose who would be on his/her planning team?	New survey or interview	Third party
% of adults who report that planning team members know them well	Are the people on your team the ones that know you the best? Do you feel that they know you well? Do they know what you like and don't like?	New survey or interview	Third party
% of families who report that planning team members know the adult well	Are the people on the planning team the ones who know the adult the best? Do they know him/her well? Do they know what he/she likes and dislikes?	New survey or interview	Third party
% adults who report that planning team members have the capacity to support them	Do you think that the people on your team know how to help you? Do they know what to do to help you? Should someone else be on the team?	New survey or interview	Third party
% of families who report that planning team members have the capacity to support the adult	Do you think that the people on the planning team are capable of supporting the adult to achieve his/her goals? Should someone else be on the team?	New survey or interview	Third party
% planning teams that include natural supports	Are there natural supports on the adult's planning team?	Existing records, Modify collection	Agencies
% of planning team members that are natural supports	# of natural supports / # of people on the planning team ¹ ¹ exclude the adult with IDD from count	Existing records, Modify collection	Agencies

B1: Indicators related to the Right Attitudes: Planning Teams

Indicators	Questions	Format	Source
% of adults who report that planning team members focus on what they want for their lives	Do you get to decide what you want your life to be like? When you are planning with your team, do they ask you what you want? Do they ask you about your dreams?	New survey or interview	Third party
% of families who report that planning team members focus on what the adult wants for his/her life	Do planning team members ask the adult what he/she wants for his/her life?	New survey or interview	Third party
% of adults who report that planning team members focus on their strengths and abilities	Tell me about the things that you are good at – like cooking, or arts, or sports. Do the people on your team know what you are good at? Are the things that you are good at part of your plan? Do you get to do the things that you are good at?	New survey or interview	Third party
% of families who report that planning team members focus on the adult's strengths and abilities	Do the people on the planning team know what the adult is good at? Does the plan reflect what he/she is good at?	New survey or interview	Third party
% of adults who report that planning team members respect their choices	Tell me about the choices that you make with your planning team – for example, about the things that you want to do, or where you want to live. What kind of choices do you make? When you make a choice, is it respected? If you want to quit a certain day program, can you quit or do you have to go anyways? Do the people on your team try to make you change your mind or choose something else? Can you give an example of when they asked you to make another choice?	New survey or interview	Third party
% of families who report that planning team members respect the adult's choices	Do you think that the people on the planning team respect the adult's choices? For example, if he/she wants to quit a specific activity, or wants to try a new one, does that happen? What about when the choices are ones that seem wrong to the team – are there some types of choices that cannot be respected? What are they?	New survey or interview	Third party
% of adults who report that planning team members are committed to supporting them	Do you think that the people on your team are really there for you? Do you think that they will always be there for you?	New survey or interview	Third party
% of families who report that planning team members are committed to supporting the adult	Are the people on the planning team committed to supporting the adult? How about over the long-term?	New survey or interview	Third party

B2: Indicators related to the Right Attitudes: Environment

Indicators	Questions	Format	Source
% of adults who report feeling valued in the community	Do you know your neighbours? If you do, do you like them? Do they like you? Do you feel comfortable around other people when you are in the community – for example, at the mall or in a restaurant?	New survey or interview	Third party
% of families who report that the adult is valued in the community	Do you feel that the community in which you live values the adult? Do they value people with disabilities in general?	New survey or interview	Third party
% of adults who report that the community recognizes their abilities	Do you know your neighbours? If you do, do you think that they know the things that you are good at? Do they ever ask you for help?	New survey or interview	Third party
% of families who report that the community recognizes the adult's abilities	Do you think that the general community in which you live recognizes the abilities of people with IDD to do various things – like work, for example? Do you think that the general community in which you live recognizes that people with IDD have the same types of wants and needs – for example, having a boyfriend or girlfriend or being successful?	New survey or interview	Third party

C1: Indicators related to the Right Actions: Planning Teams

Indicators	Questions	Format	Source
% of adults who report that planning team members listen to them	During planning meetings, does the team ask you what you want or what you think? Do they encourage you to speak up? Do you feel like they listen to you?	New survey or interview	Third party
% of families who report that planning team members listen to the adult	Do the people on the planning team ask the adult about what he/she wants or thinks? Do they listen to what he/she has to say? Did goals in the plan come from the adult, or from others?	New survey or interview	Third party
% of adults who report that planning team members promote choice-making	Tell me what 'having choices' means to you. When people ask you what you want to do, do they give you examples of things that you could do? Are there many things to choose from? Like if you are asked what kind of activities you want to do, do they give lots of options like volunteering, swimming, and arts and crafts?	New survey or interview	Third party
% of families who report that planning team members promote choice-making	Do you think that the people on the planning team promote choice? Are multiple options provided to the adult?	New survey or interview	Third party
% of adults who report that planning team members facilitate choice-making	<p>What do you do when you have to choose between many things? Do the people on your planning team help you to choose between the options? How do they help?</p> <p>Some choices can be easier to make than others. For example, it might be easier to choose if you are choosing between things that you have already done. But sometimes there may be options that you don't really understand, and that can make it hard to choose. Do the people on your team help you to understand the options? For example, do they explain the options so that you know what they are about?</p> <p>Sometimes, even when you understand the options, it can still be hard to make a choice. For example, it can be hard to know which one is the best option. Do the people on your planning team help you to figure what would be best for you? Do they tell you about the good things and bad things about each option?</p>	New survey or interview	Third party

C1: Indicators related to the Right Actions: Planning Teams (CONTINUED)

Indicators	Questions	Format	Source
% of families who report that planning team members facilitate choice-making	When the adult is having difficulty choosing, do members of the planning team explain the options in a way that he or she understands? Do the members of the planning team discuss with the adult the risks and benefits of each of the options to help with choices?	New survey or interview	Third party
% of adults who report that the planning process has increased opportunities for making choices	Do you feel like you get to make a lot of choices? Do you wish that you could make more choices about your life? Since you've been working with your planning team, do you make more choices? Can you tell me about choices that you make now that you didn't make before? For example, before you just went to a day program, but now you go to the one you chose.	New survey or interview	Third party
% of families who report that the planning process has increased opportunities for making choices	Do you think that planning has led to the adult having more opportunities to make choices? Can you give an example of new types of choices the adult makes?	New survey or interview	Third party
% of adults who report that planning team members work collaboratively with one another	Tell me about how the people on your planning team work together. Do they get along? Are there sometimes arguments? What do they argue about? When people disagree, what happens? How is it handled?	New survey or interview	Third party
% of families who report that planning team members work collaboratively with one another	Do the members of the planning team work collaboratively with one another? Do they work well together? How are disagreements handled?	New survey or interview	Third party
% of adults who report that planning team members are accountable to them	When someone on your team says that they will do something, do they do it? For example, if they say that they will get you a copy of the bus schedule, do they get it for you? If they don't, do they say that they are sorry? Do they tell you why they didn't do it?	New survey or interview	Third party
% of families who report that planning team members are accountable to the adult	Do the people on the planning team do what they say they are going to do? For example, if they say that they will contact a potential employer, do they do it? Are they held responsible for their actions, or inactions?	New survey or interview	Third party

C1: Indicators related to the Right Actions: Planning Teams (CONTINUED)

Indicators	Questions	Format	Source
% of adults who report that planning team members engage in building community capacity	What kinds of things are you doing in the community? For example, do you go to the library, or to the local pool? Did the people on your planning team help you out when you first started going there? For example, did they go to the library with you and introduce you to the people there, so that you would know who to ask if you needed help?	New survey or interview	Third party
% of families who report that planning team members engage in building community capacity	Has the planning team tried to engage community members in supporting the adult? For example, if the adult is really interested in reading, has anyone reached out to staff at the library or invited them to attend a planning meeting? Do people on the planning team try to educate others in the community about the adult, or about people with IDD in general?	New survey or interview	Third party
% of adults who report that planning team members foster connections	Tell me about your friends and the people you hang out with. Have the people on your planning team helped you keep in touch with your friends? For example, do they drive you to the movies so that you can meet up with your friends?	New survey or interview	Third party
% of families who report that planning team members foster connections	Do the people on the planning team help the adult stay in touch with friends? For example, drive them to a friend's house?	New survey or interview	Third party
% of adults who report planning process has led to more community connections	Have the people on your team helped you to meet new people? Who did they help you meet? Have the people on your team helped you to make new friends? How have they helped you make new friends?	New survey or interview	Third party
% of families who report planning process has led to more community connections	Have the people on the planning team helped the adult meet new people or make new friends?	New survey or interview	Third party

C1: Indicators related to the Right Actions: Planning Teams (CONTINUED)

Indicators	Questions	Format	Source
% of adults who report that planning team members identify the needed supports within and outside of the developmental services system to help their achieve goals	<p>What kind of help or support do you need in your everyday life? For example, do you need help with transportation, making meals, or dealing with money?</p> <p>Who helps you with these things? Does your family help? Do staff help? Do you sometimes get help from people outside of the agency? Tell me more about the people who help you.</p> <p>Where do you go to do the things that you like? Do you mostly do things at the agency – like day programs, or are you doing things all over the community? Is doing things in the community part of your goals?</p> <p>Do the people on your team encourage you to do things outside of the agency? Like, go to an arts class at the college instead of to one at the agency?</p>	New survey or interview	Third party
% of families who report that planning team members identify the needed supports within and outside of the developmental services system to help the adult achieve his/her goals	<p>Are the supports that will be needed to help the adult achieve goals identified during planning?</p> <p>Where do the supports come from? Do all supports come from one agency, or are there multiple agencies involved? Does the adult also access generic or community services – for example, Meals on Wheels, or an aerobics class at the local gym?</p> <p>Who supports the adult – is it family, agency staff, others? Do people in the community provide support? For example, does a co-worker provide on-the-job support, or would that kind of help come from the agency?</p> <p>Do team members consider first what is available in the agency or in the community? Do they encourage the adult to do activities or find supports through the community?</p>	New survey or interview	Third party

C1: Indicators related to the Right Actions: Planning Teams (CONTINUED)

Indicators	Questions	Format	Source
% of adults who report that planning team members engage in continuous evaluation of actions and progress	Do the people on your planning team check-in with you to see how you are doing with your goals? What do they do if things are not going well?	New survey or interview	Third party
% of families who report that planning team members engage in continuous evaluation of actions and progress	Do the people on the planning team check-in with the adult to see how he/she is doing with goals? How often would you say this is done? What happens when things aren't going well?	New survey or interview	Third party
% of adults who report that planning team members are responsive to their changing wants and needs	Have your supports and services changed because of your goals? Can you give an example of how things changed? For example, did you quit an activity, or start a new one? What happens when you change your mind about an activity or program? Do the people on your planning team help you to sort things out? Do they help you to do the new things that you want to do, or do they try to make you stick with the old things?	New survey or interview	Third party
% of families who report that planning team members are responsive to changes in the adult's wants and needs	Have the identified supports been put into place to help the adult work toward his/her goals? Are there certain types of supports and services that remain the same, regardless of the goals identified? Which ones? Typically speaking, what is the lag time between identification of supports needed to achieve goals and implementation of those supports? Why aren't supports implemented immediately? Do some types of supports take longer to implement than others? Which ones? Whose job is it to make sure that the needed supports are implemented?	New survey or interview	Third party

C2: Indicators related to the Right Actions: Agency

Indicators	Questions	Format	Source
<p>% of agencies that provide training in person-centered thinking and practices</p> <p>% of agencies that have provided person-centered training to all levels of staff</p> <p>% of agencies that have provided person-centered training to all staff</p>	<p>In the past 12 months, who among your staff have received training in person-centered thinking and practices?</p> <p><i>Rate all categories of staff using: All, Most(more than 50%), Some (less than 50%), None, N/A</i></p> <ol style="list-style-type: none"> 1. Managers or Directors 2. Planning or Support Service Coordinators 3. Team Leaders 4. Direct Support Staff 5. Administrative Support 6. Other (please specify) 	Existing records, Modify collection	Agencies
<p>% of agencies that identify any element of person-centered thinking as the most important focus of training</p> <p>% of agencies for which all elements of person-centered thinking have the highest ratings of importance</p>	<p>In the past 12 months, what level of importance was given to each of the following in your organization's staff training program? <i>Rate all categories using: All, Most(more than 50%), Some (less than 50%), None, N/A</i></p> <ol style="list-style-type: none"> 1. Health and safety 2. Focusing on client strengths 3. Promoting independence 4. Supporting choice-making 5. Risk management 6. Dealing with interpersonal conflict 7. Making community connections 8. Building circles of support 9. Engaging in active support 10. Other (please specify) 	New survey	Agencies
% of agencies that focus training most heavily on elements of person-centered thinking	<p>Rank order the four areas (from above) that received the most attention in your staff training program over the past 12 months.</p> <p><i>Area receiving most attention: _; 2nd most attention: _; 3rd most attention: _; 4th most attention: _;</i></p>	New survey	Agencies
% of agencies that provide planning-related training to adults with IDD	<p>Does your agency provide planning-related training to adults with IDD?</p> <p>Number of agencies who provide planning-related training to adults / Number of agencies</p>	Existing records, Modify collection	Agencies MCSS
% of adults with IDD who have received planning-related training in the last 12 month ²	<p>In the last 12 months, approximately how many adults with IDD have received planning-related training?</p> <p>Number of adults who received training / Number of adults supported</p> <p>²This could also be reported at agency level – denominator is # people supported by the agency</p>	Existing records, Modify collection	Agencies

C2: Indicators related to the Right Actions: Agency (CONTINUED)

Indicators	Questions	Format	Source
% of agencies that provide planning-related training to family and community members	Does your agency provide planning-related training to family and community members? Number of agencies who provide planning-related training to family and community members / Number of agencies	Existing records, Modify collection	Agencies MCSS
Ratio of family and community members who have received planning-related training from agencies in the last 12 months to adults supported ³	In the last 12 months, approximately how many family or community members have received planning-related training? Number of family and community members trained : Number of adults supported ³ This could be reported at agency level – second number is # people supported by the agency	Existing records, Modify collection	Agencies

C3: Indicators related to the Right Actions: System

Indicators	Questions	Format	Source
% adults entering the system who already have a person-directed plan	Number of adults entering the system with a person-directed plan / Number of adults/families entering the system through the DSO	New data collection	DSO MCSS
% of adults/families entering the system who request information about PDP	Number of adults/families who request information about PDP at initial contact with DSO / (Number of adults/families who contact the DSO for the first time – Number of adults/families who already have a plan)	New data collection and Existing records, Modify collection	DSO MCSS
% of adults/families already in service who request information about PDP	Number of adults/families already in service who request information about PDP through DSO / Number of adults/families already in service who contact the DSO	Existing records, Modify collection	DSO MCSS
% of adults/families entering the system who request PDP as a service	Number of adults/families who request PDP as a service at initial contact with DSO / Number of adults/families who contact the DSO for the first time	Existing records, Modify collection	DSO MCSS
% of adults/families already in service who request PDP as a service	Number of adults/families already in service who request PDP as a service through the DSO / Number of adults already in service who contact the DSO	Existing records, Modify collection	DSO MCSS
% of adults/families entering the system who request and receive PDP as a service	Number of adults/families who receive PDP as a service following initial contact with DSO / Number of adults/families who requested PDP as a service at initial contact with DSO	Existing records, Modify collection	DSO MCSS
% of adults/families already in service who request and receive PDP as a service	Number of adults/families already in service who receive PDP as a service / Number of adults/families already in service who requested PDP as a service through the DSO	Existing records, Modify collection	DSO MCSS
% of adults/families entering the system who request PDP as a service after requesting information about PDP	Number of adults/families who request PDP as a service following initial contact with DSO / Number of adults/families who requested information about PDP at initial contact with DSO	Existing records, Modify collection	DSO MCSS
% of adults/families already in service who request PDP as a service after requesting information about PDP	Number of adults/families already in service who request PDP as a service through the DSO / Number of adults/families already in service who requested information about PDP through the DSO	Existing records, Modify collection	DSO MCSS

C3: Indicators related to the Right Actions: System (CONTINUED)

Indicators	Questions	Format	Source
% of adults/families entering the system who request individualized funding	Number of adults/families who request individualized funding at initial contact with the DSO / Number of adults/families who contact the DSO for the first time	Existing records, Modify collection	DSO MCSS
% of adults/families already in service who request individualized funding	Number of adults/families already in service who request individualized funding through the DSO / (Number of adults already in service ⁴ – Number of adults in service who already receive individualized funding) ⁴ This number is based on the total number of people supported by the adults already in service requesting individualized funding	Existing records, Modify collection, and interpretation	DSO MCSS Agencies
% of adults/families entering the system who receive individualized funding	Number of adults/families entering the system who receive individualized funding after initial contact with the DSO / Number of adults/families who contact the DSO for the first time	Existing records, Modify collection	MCSS
% of adults/families already in service who receive individualized funding	Number of adults/families already in service who receive individualized funding / Number of adults already in service who contact the DSO ⁵ ⁵ Ideally, the denominator would be the total number of adults supported	Existing records, Modify collection	MCSS
% of adults/families entering the system who request and receive individualized funding	% = Number of adults/families entering the system who receive individualized funding after initial contact with the DSO / Number of adults/families entering the system who requested individualized funding through the DSO	Existing records, Modify collection	DSO MCSS
% of adults/families entering the system who request and receive individualized funding	% = Number of adults/families already in service who receive individualized funding through the DSO / Number of adults/families already in service who requested individualized funding through the DSO	Existing records, Modify collection	DSO MCSS
Number of transfer payment agencies receiving requests for unencumbered independent facilitation	Over the past 12 months, approximately how many of the adults/families supported by your agency inquired about use of unencumbered, independent facilitation for planning? <i>All Most (more than 50%) Some (less than 50%) None</i>	New survey	Agencies
Number of transfer payment agencies involved in unencumbered independent facilitation	Over the past 12 months, approximately how many of the adults supported by your agency used an unencumbered, independent facilitator for planning? <i>All Most (more than 50%) Some (less than 50%) None</i>	Existing records, Modify collection	Agencies

C4: Indicators related to the Right Actions: Environment

Indicators	Questions	Format	Source
% of adults who report having opportunities to experience valued and expected social roles	<p>Let's talk about how you spend your time. Do you work? Are you volunteering? Do you go to school? If not, why? For example, if you are not working, is it because you don't want to or because you can't find a job?</p> <p>Let's talk about who you spend your time with. Do people invite you out? Who are your friends? Do you have a boyfriend/girlfriend?</p>	New survey or interview	Third party
% of families who report that the adult has opportunities to experience valued and expected social roles	<p>Is the adult involved in productive activities? Is he/she working? Volunteering? Going to school? If not, why? For example, if he/she isn't working, is it because he/she doesn't want to, or because he/she can't find a job?</p> <p>Does the adult have friends, people who invite him/her to do things? Does the adult have friends or relationships with people other than paid support workers or family members?</p>	New survey or interview	Third party
% of adults who report having access to public goods and services	<p>Let's talk about the services that you use. Where do you do your activities? For example, are they all at the agency, or do you do some activities outside of the agency – like go to a yoga class in the community? When you want to do an activity in the community, can you? Is there anything that stops you from doing activities in the community? When you travel to and from places, do you use public transportation – like the city bus, do you get a ride from a family member or friend, take a taxi, or does someone from the agency drive you around? When you want to use the city bus to go somewhere, can you? Is there anything that stops you from taking the city bus?</p>	New survey or interview	Third party
% of families who report that the adult has access to public goods and services	<p>We would like to know whether the adult uses general services in the community. For example, does he/she go to a fitness class at the gym, go to the library, or use public transportation?</p>	New survey or interview	Third party