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QUALITY FORUM**

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Person-Centered Planning and Practice

Web Meeting 7

February 3, 2020

Welcome



Housekeeping

- Google Chrome is the preferred web browser.
- To dial in, call 1-800-768-2983
 - ▣ When prompted for the access code dial 5148141
 - ▣ If not speaking, please mute your line *6 and *7 to unmute

NQF Project Team

- Samuel Stolpe, PharmD, MPH, Senior Director
- Kate Buchanan, MPH, Senior Project Manager
- Yvonne Kalumo-Banda, MSc, Project Manager
- Teja Vemuganti, MPH, Project Analyst

Person-Centered Committee

- **Gretchen Napier MSHA, CMC - Co-chair**
- **Cheryl Phillips, MD, AGSF - Co-chair**

Members

- Glenda Armstrong, BSN, RN
- Pearl Barnett, MPA
- Sally Burton-Hoyle, MS, EdD
- Amber Carey-Navarrete
- Bruce Chernof, MD
- Bevin Croft, MPP, PhD
- Amber Decker, FPA
- Gail Fanjoy, MS
- Susan Fegen, LVN, PCTCMT, PCTCT
- Sara Link, MS
- Joseph Macbeth
- Denise Myler
- Melissa Nelson
- Patricia Nobbie, PhD
- Kate Norby

- Ann O'Hare, MD, MA
- Leolinda Parlin, BA
- Richard Petty, MBA
- Mia Phifer, MSJ
- Michael Smull
- Dori Tempio, MS
- Janis Tondora, PsyD
- Maggie Winston

Liaisons

- Daniel Fisher, MD, PhD
- Mathew McCollough
- Pam Montana, MSPM
- Penny Shaw, PhD

Meeting Objectives



Meeting Objectives

- Finalize the draft measurement framework
- Solicit Committee input on the person-centered planning research agenda

Draft Measurement Framework



Framework for Measure Development

A measure framework is a way of structuring measures within a conceptual model of a system

- Includes measures to influence desirable structures, processes, and outcomes
- Focuses on the strategies, goals and objectives that lead to improvement

Framework Domains for Person-Centered Planning

- Person-Centered Plan Measures
- PCP Facilitator Measures
 - ▣ Includes the person-centered planning process
- System Level Measures



Person-Centered Plan Measures

Plan Creating and Implementation

- Preplanning implemented to ensure individuals prepared to make plan
- Documentation of a plan
- Updating of plan
- Plan assessment during care transitions
- Lookback measure: what was the last year like and have the goals changed

Plan Content

- Plan reviews the goals of the person
- Barriers to goals were identified and addressed
- Goals include a diversity of desired outcomes rather than reflecting a fixed set of goals dictated by the facilitator
- Plan is written in person's own words



Person-Centered Plan Measures

Person-reported outcome-based performance measure (PRO-PMs)

- Goal attainment
- Person feels that they know what their rights are
- Person able to access their own plan
- Person's assessment of planning experience
 - ▣ Perception of leadership role, empowerment
 - ▣ Perception of informed decision making
 - ▣ Focus on strengths
 - ▣ Addressed goals and preferences, things important to person
 - ▣ Correct people were in the room
 - ▣ Overall satisfaction with the facilitator



PCP Facilitator Measures

Competency measurement

- PCP training completion
- Knowledge of PCP principles
- Measurement of competencies
 - ▣ Measure of knowledge
 - » Resource knowledge
 - » Policy and regulations, e.g., knowledge of HIPAA and HITECH
 - » Knowledge of non-medical transportation
 - » Knowledge of disabilities and health conditions with persons they are working with
 - ▣ Measure of skill
 - » Cultural competency
 - » Person-centeredness training
 - » Facilitator as advocate for the person



PCP Facilitator Measures

Communication metrics

- Receiving language services
- Screening for preferred spoken language
- Hearing and other communication tools available and utilized

Plan production and updating

- Timely assessment and update
- Timely sharing and review
- Was the plan produced within the timeframe required
- Tracking what happens after a plan is in place



System Level Measures

- Structural measures
 - ▣ Training programs in place
 - ▣ Ratio of PCP facilitators to participants
 - ▣ Resource allocation
- Process measures
 - ▣ Person-centered planning completeness rate
 - ▣ Staff training completeness rate/percentage of trained staff
 - ▣ PCP quality improvement participation
- Outcome measures
 - ▣ Barriers were addressed
 - ▣ Person reported outcomes measures
 - » Quality of life
 - » Experience



Discussion

What further considerations does the Committee have for measures to include in the measure framework?

Person-Centered Planning Research Agenda

Environmental Scan Goals

A scan of existing person-centered quality and efficiency measures will inform several objectives of the project:

- Framework of PCP measure development
- **Research agenda for PCP**
- Identification of gaps in quality and efficiency measures available
- Identification of priorities to advance or address measurement gaps



Environmental Scan Results

- PubMed search of “Person Centered Planning” returned 39 results.
- Recent literature is limited
 - ▣ Many studies conducted in late 1990s and early 2000s
 - ▣ Limitations in funding and study design
 - ▣ Many are IDD specific
- Key research areas identified
 - ▣ Effectiveness/preferences identified/assessing goal attainment
 - ▣ Training impact
 - ▣ Comparison or compatibility with other programs
 - ▣ Barriers to adoption
 - ▣ Impact of PCP on treatment adherence

Research Domains Identified

- Effectiveness of PCP
- Person's Perceptions of PCP
- Facilitation Improvement
- Program Improvement
- Population-Specific Research
- Others



Importance of a Research Agenda

- Research agenda: a plan and a focus on issues and ideas in a subset of the research field of interest.
 - ▣ Not sufficient resources to study everything
 - ▣ The agenda determines a plan of prioritization
- Research agendas are not static; they are dynamic
 - ▣ As understanding grows, priorities will naturally shift
- Types of studies to consider
 - ▣ Hypothesis generating vs. hypothesis testing (low cost/high cost)
 - ▣ Qualitative vs. quantitative



Defining Priorities in PCP Research

- Effectiveness of PCP
 - ▣ Outcomes
 - ▣ Comparative effectiveness
 - » Different PCP approaches
 - » Other approaches (e.g., interdisciplinary service planning)
 - ▣ Goal attainment
 - ▣ Impact on mental health
 - ▣ Specific program evaluation
 - ▣ Cost effectiveness
- Person's Perceptions of PCP
 - ▣ Actual "Person Centeredness"
 - ▣ Critical elements to person satisfaction with PCP process
 - ▣ Perceptions of goal attainment and QOL



Defining Priorities in PCP Research

- Facilitation Improvement
 - ▣ Process improvement
 - ▣ Training effectiveness
 - ▣ Facilitation preferences in PCP
 - ▣ Overcoming barriers to individual person-level goals
- Program Improvement
 - ▣ Overcoming barriers to PCP program implementation
 - ▣ Cost effectiveness and resource utilization in PCP
 - ▣ Strategies to encourage participation
 - ▣ Cultural considerations within PCP
 - ▣ Comparative effectiveness of service delivery models



Defining Priorities in PCP Research

- Population Specific Research
 - ▣ IDD
 - ▣ Elderly
 - ▣ Culture
 - ▣ Disability
 - ▣ Etc.
- Others
 - ▣ Impact of PCP related policy changes
 - ▣ Effective PCP in care transitions



Discussion

What other research domains are missing?

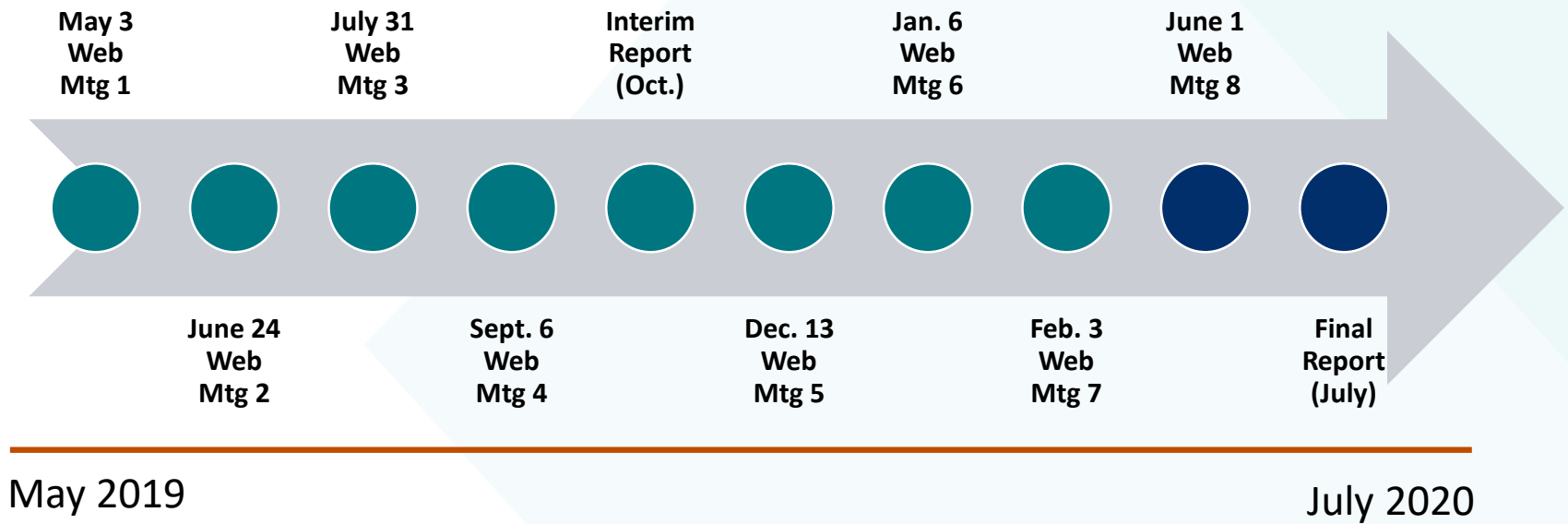
What other research ideas/projects does the Committee consider to be of highest priority?

Public Comment

Next Steps



Project Timeline





Committee Web Meeting Schedule

Timing	Web Meeting	Description
June 1, 2020 1:00 pm – 3:30 pm ET	Web Meeting 8	Review public comments received on the draft comprehensive report.

Next Steps

- Final draft report will be posted for a **30-day public** commenting period from **April 8 to May 8, 2020.**
- Final draft report will include:
 - ▣ Definition of PCP; set of core competencies of people performing PCP facilitation; recommendations to HHS for systems characteristics that support person-centered thinking, planning, and practice; framework for PCP measure development; research agenda for PCP; and environmental scan.



Contacts

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THANK YOU.

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