



NATIONAL
QUALITY FORUM

Person-Centered Planning and Practice

Web Meeting #2

June 24, 2019

Welcome

Helpful Tips for CenturyLink Platform

- Google Chrome is the preferred web browser
- Participants have the option to listen to webinars either by phone or through their computer. CenturyLink is compatible with screen readers (e.g., JAWS).
- To dial in call 1-800-768-2983
 - ▣ *When prompted for access code dial 5599437*
 - ▣ *If not speaking please mute your line *6*

Joining a Web Meeting

Dial-in

- Audio (listening and speaking capabilities)
- No visual

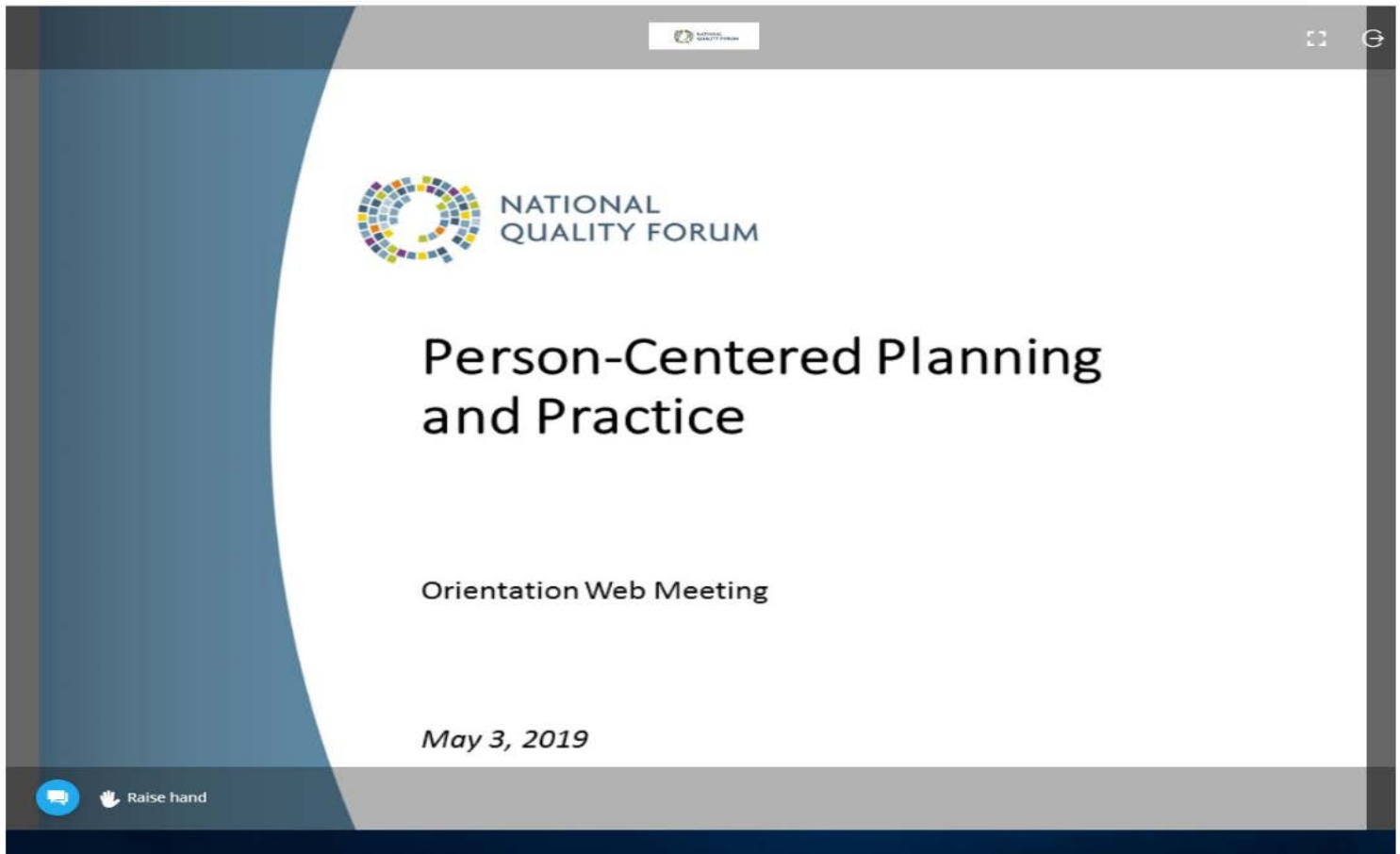
Web

- Visual (chat function available)
- Audio (listening function only, does not allow speaking capabilities)

Dial-in & web

- Visual (chat function available)
- Audio (listening and speaking capabilities)

Locating Chat and Raise Hand Functions



Chat/Comment
Button



Raise Hand feature

CenturyLink Features: Chat/Comment Function

← Chat

Q&A

NATIONAL QUALITY FORUM

Person-Centered Planning and Practice

Orientation Web Meeting

May 3, 2019

Chat with presenter

Hello, looking forward to this webinar

Send

← Chat

Q&A

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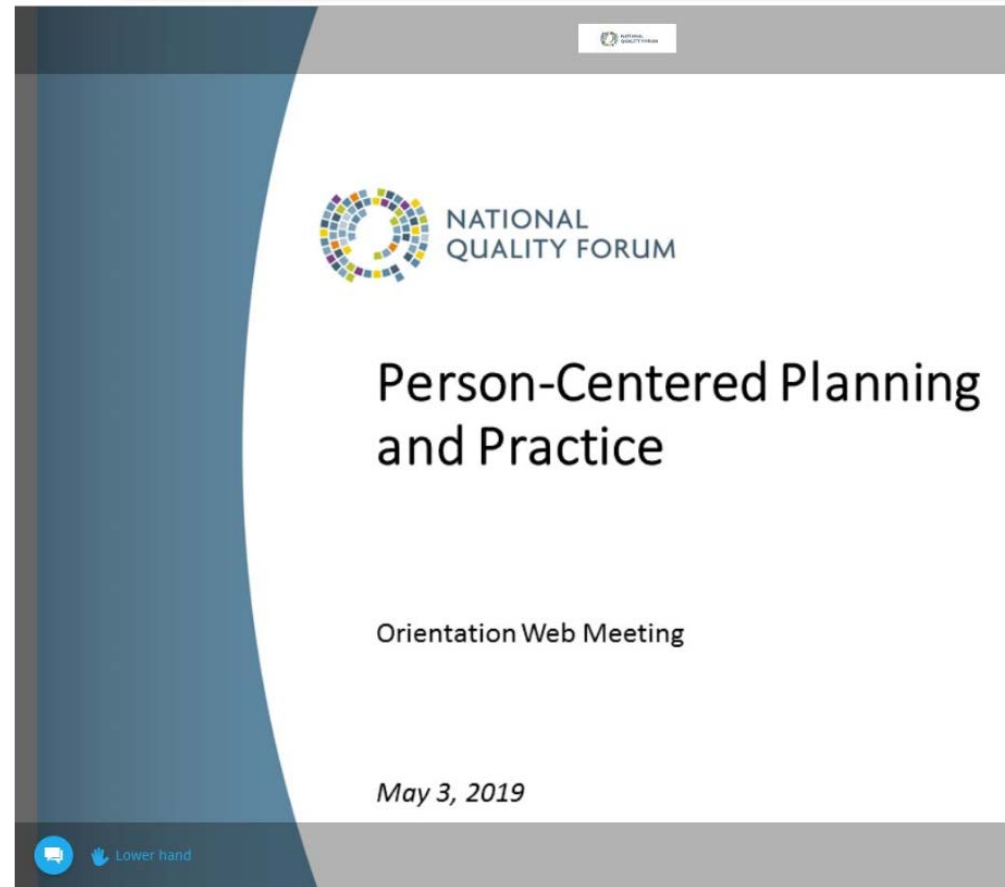
Type your question

Send

Raise hand

CenturyLink Features: Hand Raising — Participant View

- When the “raise hand” feature is engaged, text color changes from white to blue.
- When the raise hand feature is engaged, text changes from “raise hand” to “lower hand”



NQF Project Team

- Samuel Stolpe, PharmD, MPH, Senior Director
- Debjani Mukherjee, MPH, Senior Director
- Kate Buchanan, MPH, Senior Project Manager
- Yvonne Kalumo-Banda, MSc, Project Manager
- Jordan Hirsch, MHA, Project Analyst

Person-Centered Planning and Practice Committee Members

- **Gretchen Napier MSHA, CMC** - Co-chair
- **Cheryl Phillips, MD, AGSF** - Co-chair
- Glenda Armstrong, BSN, RN
- Pearl Barnett, MPA
- Sally Burton-Hoyle, MS, EdD
- Amber Carey-Navarrete
- Bruce Chernof, MD
- Bevin Croft, MPP, PhD
- Amber Decker
- 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

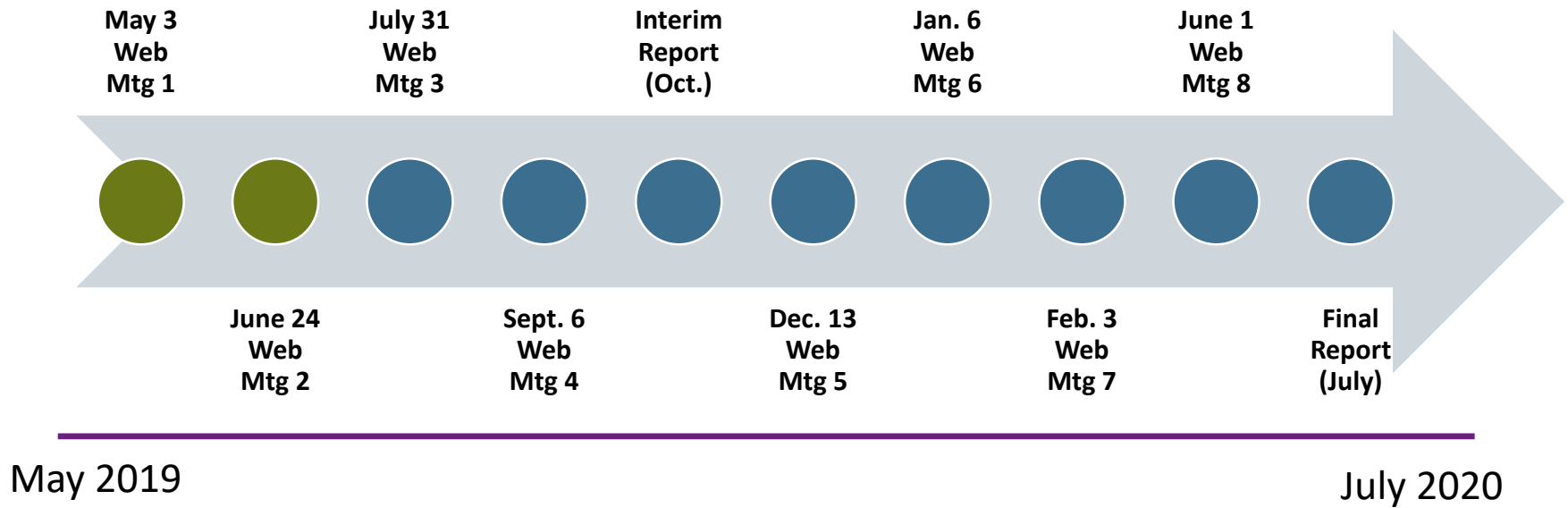
Review Project Objectives

Person-Centered Planning and Practice Committee Charge

In the course of eight web meetings, the Committee will:

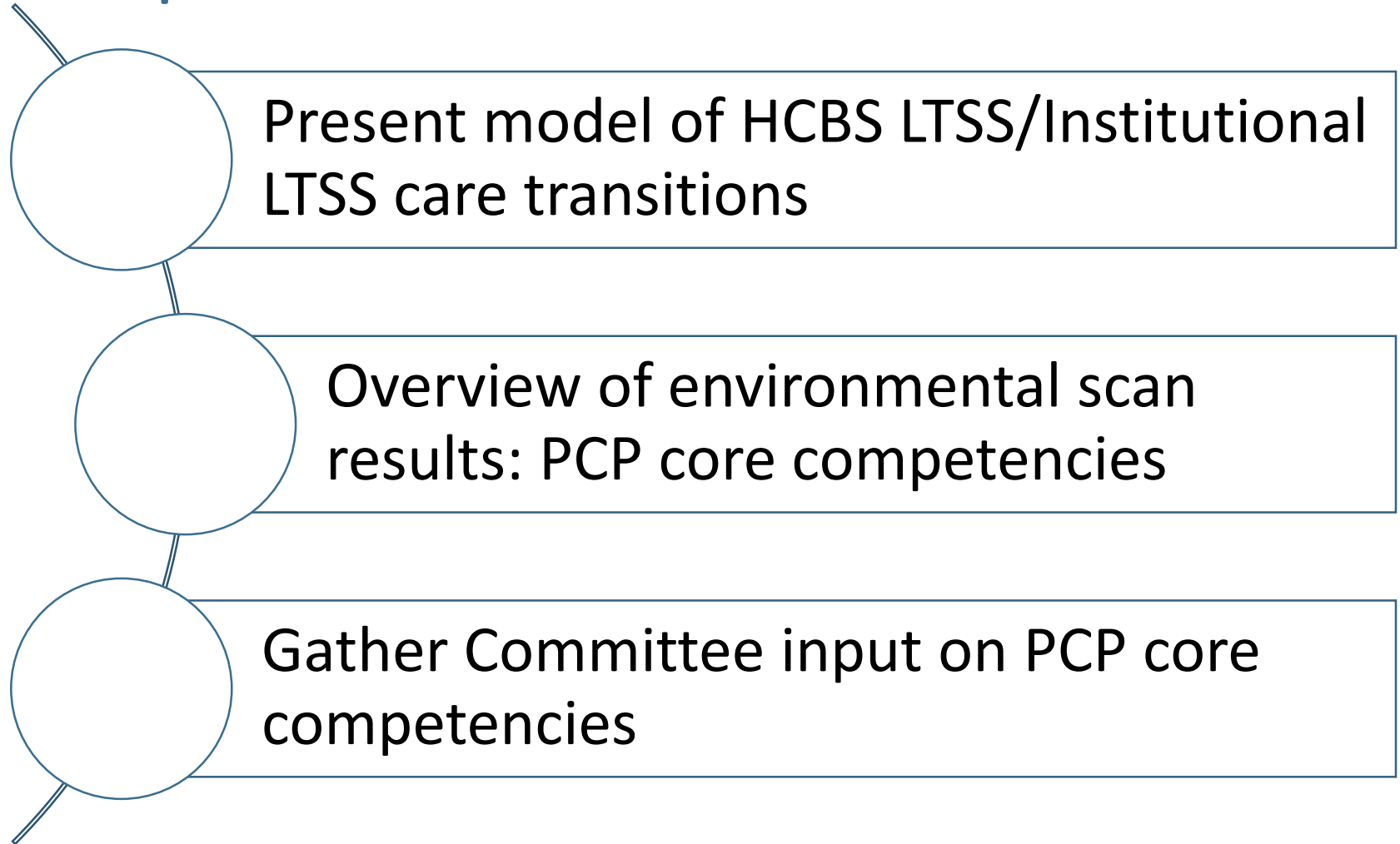
- Refine the current definition(s) for person-centered planning (PCP);
- **Develop a set of core competencies for performing PCP facilitation;**
- Make recommendations to the Department of Health and Human Services (HHS) on systems characteristics that support PCP;
- Develop a conceptual framework for PCP measurement; and
- Create a research agenda for future PCP research.

Project Timeline



Meeting Objectives

Meeting Objectives: Input on PCP Core Competencies



Recap from Previous Meeting

Draft Definition of Person-Centered Planning

- Staff incorporated Committee feedback as well as input from our federal partners.
- Current draft definition will be revisited by the Committee prior to release of the draft report for comment in November 2019.

Person-Centered Planning Committee Composition

- Committee members and public commenters expressed a desire for the Committee to receive additional input from self-advocates who have lived experience with intellectual/developmental disabilities (I/DD), autism, and dementia.
- NQF responded to this feedback and will appoint up to four liaisons who will advise the Committee during its deliberations.
- The liaisons will begin service by the next web meeting on July 31, 2019.

Core Competencies for PCP Facilitation

PCP Practice Domain Connections



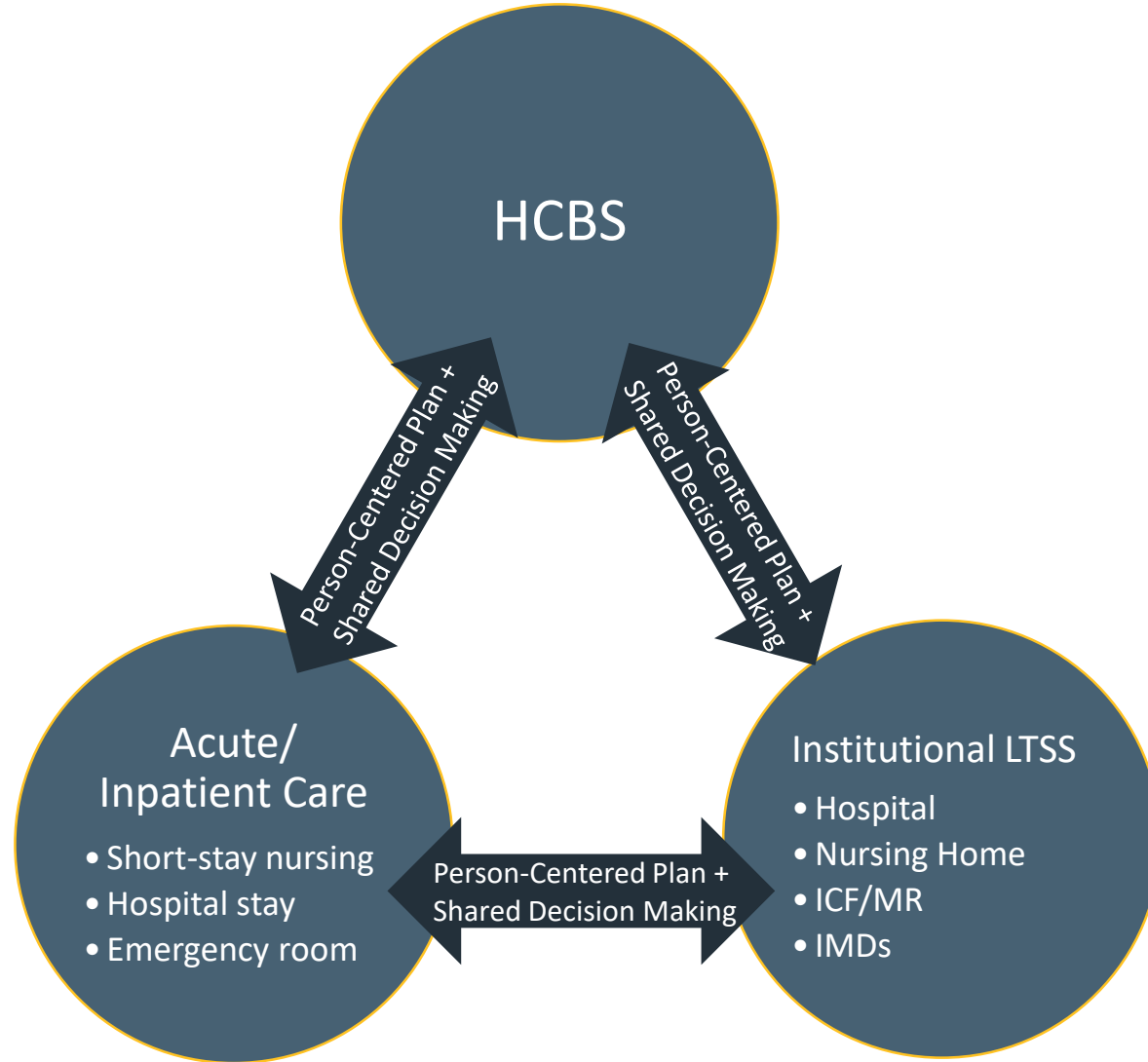
Committee Development of PCP Core Competencies

- NQF will develop a draft set of core competencies of people performing PCP facilitation.
 - *Given the breadth and depth of person-centered planning across all areas of health care and LTSS delivery, there will likely be a need for **multiple tiers or levels of intensity** and skills needed to facilitate person-centered planning processes as medical and LTSS needs increase.*
- The Committee will refine the draft set of core competencies of people performing PCP facilitation.
 - *The Contractor (NQF) shall conduct a comprehensive analysis of the required competencies across approaches to person-centered planning and shall **summarize the competencies** across each approach.*
 - *The Contractor shall present these findings to the multistakeholder group and shall **lead a discussion with the group to determine a set of core competencies** necessary for people who facilitate PCP processes and who are responsible for ensuring a meaningful person-centered plan is produced.*
 - *The multistakeholder committee shall consider the breadth and depth of PCP across various areas of health care and LTSS delivery in their deliberations, including cross-cultural considerations, shared decision-making, and shall be encouraged not to reduce effective practices to the lowest common denominator, but to instead consider how tiers or levels of competency can be established, corresponding to the **levels of complexity and domains of practice across the full spectrum of needs**.*

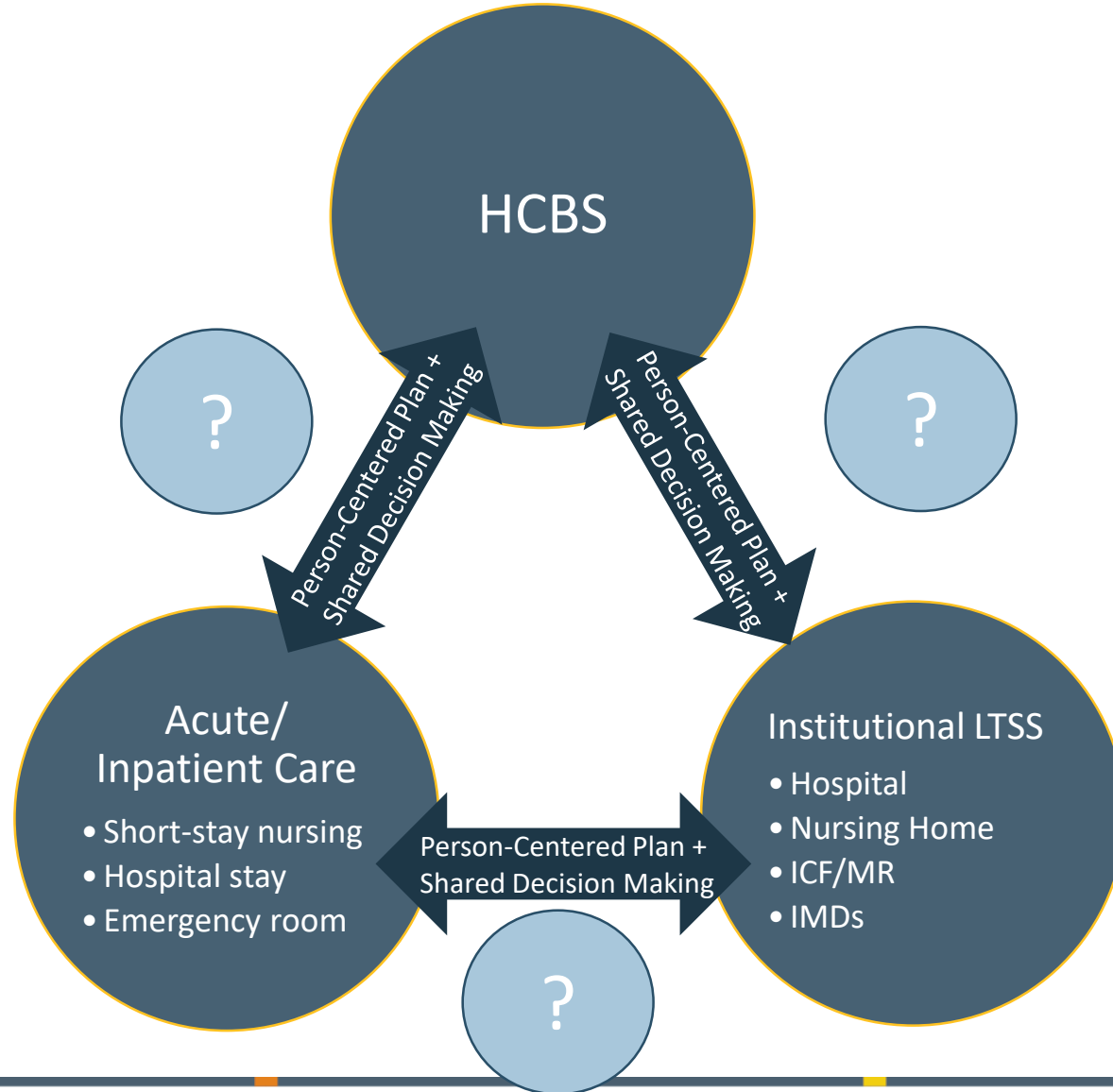
Committee Approach: PCP Facilitation Core Competencies

- Review core competencies identified by NQF through environmental scan of 28 PCP facilitation methodologies
- Develop generalized model for core competencies for PCP facilitation in HCBS, including *shared decision making and* potential transitions to other settings
 - ▣ *Presentation and discussion of case studies of HCBS transitions and resulting changes to PCP*
 - ▣ *Discuss how to generalize PCP competencies based on levels of complexity and domains of practice*

Practice Domains and Interaction Points



Practice Domains and Interaction Points



Representative Settings¹

HCBS

- Recipient's individual personal home
- Integrated community-based day settings
- Specialized family care homes
- Residential treatment centers/facilities
- Group homes*
- Assisted living*
- Places of employment*
- Congregate day settings (adult day centers/day habilitation)*

Institutional

(LTSS in long-term facility-based settings connected to inpatient treatment)

- Nursing homes
- Hospitals
- Institutional care facilities for individuals with intellectual disabilities (ICF-IID)
- Institutions for mental disease (IMD)

Acute/Inpatient Care

- Emergency rooms
- Hospitals
- Hospice settings
- Short-stay/time-limited nursing care facilities
- Short-stay rehabilitation facilities
- Post-acute care settings
- Primary care/physicians' offices

¹ = Settings listed are a representative sample and will be edited and expanded based on Committee input

* = Could be institutional or HCBS depending on whether they meet the federal HCBS settings criteria

Representative Services¹

HCBS*

- Personal care
- Supported employment
- Community-based, integrated day services
- Congregate day services (i.e., day habilitation services; adult day health)
- Residential treatment services
- Supported living
- Prevocational services
- Congregate or delivered meal services
- Transportation
- Home repairs, modifications, and safety assessments
- Homemaker and chore services
- Information and referral services
- Financial or legal services
- Short-term respite care

Institutional*

(LTSS in long-term facility-based settings connected to inpatient treatment)

- Diagnostic
- Preventive services
- Therapeutic services
- Long-term rehabilitative services
- Maintenance
- Personal care services

Acute/Inpatient Care*

- Emergency medical treatment
- Hospitalization
- Hospice or end-of-life care
- Short-term nursing care
- Short-term rehabilitation services: speech, occupational, physical, psychosocial, other
- Post-acute care

¹ = Services listed are a representative sample and will be edited and expanded based on Committee input

* = Could be institutional or HCBS depending on whether they meet the federal HCBS settings criteria

Person-Centered Planning Competencies: Foundational Skills

- Self-awareness: cultural assumptions, psychological development and temperament, personality dynamics, prejudices
- Group power dynamics (family, systems, broader social/cultural dynamics)
- Understanding of philosophical basis of purpose and meaning in life
- Strengths based thinking/positive attributes
- Empathy/emotional intelligence
- Individual and systems advocacy
- Navigate the complexity of choice
- Cultural humility, competency
- Openness to learning
- Critical and creative thinking
- Qualitative/inductive research methods

Person-Centered Planning Competencies: Relational and Communication Skills

- Negotiation
- Dispute resolution
- Engagement skills
- Active/reflective listening
- Team building
- Customer service

Person-Centered Planning Competencies: Philosophy

- Effective Freedom
- Recovery
- Empowerment

Person-Centered Planning Competencies: Resource Knowledge

- LTSS and larger healthcare system
- Safety net providers
- Community assets/resources
- Populations and subgroups
- Legal issues: protective services, family court, guardians, decision support tools
- Local advocacy groups and individuals
- Gaps in services and supports

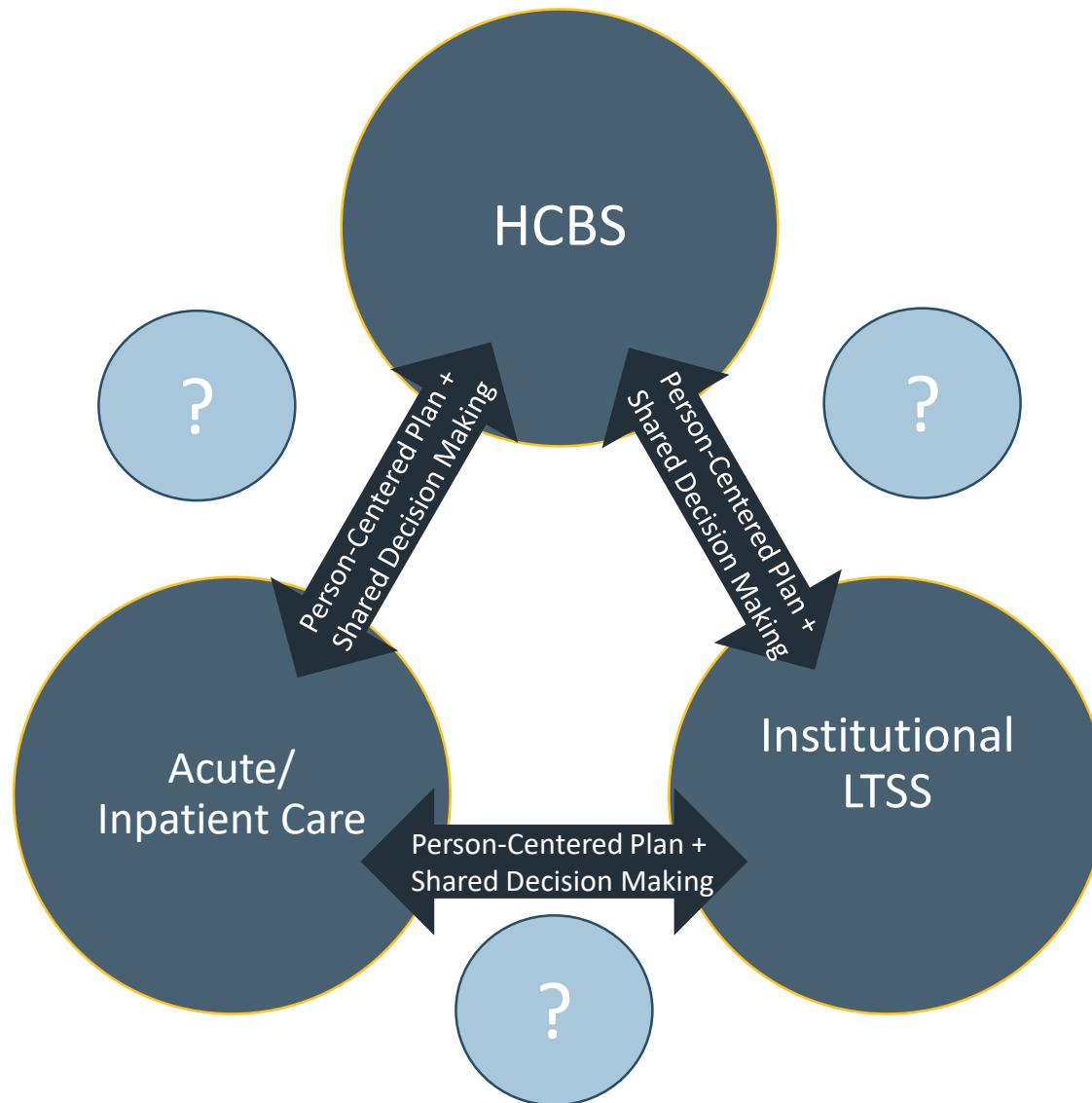
Person-Centered Planning Competencies: Policy and Regulatory Context

- Human rights
- Olmstead
- Americans with Disabilities Act
- Independent living philosophy
- Social model of disability

Discussion

- Have all the necessary Person-Centered Planning competencies been captured?
- Are there other Person-Centered Planning competencies category/skills that need to be added?
- Can some of the Person-Centered Planning competencies be combined with each other?

Discussion: PCP by Care Domain



Example: Complexity and Care Domain Considerations

- An adult with IDD and multiple chronic conditions enters a nursing home for a short-stay (<101 days), which extends into a six-month stay.
- It includes the required person-centered planning process.
- Ultimately the nursing home resident expresses the desire to move back into community which triggers a broader HCBS transition planning process.
 - ▣ *What are the two person-centered planning processes (NH, HCBS), what are the practice standards, and what are the competencies necessary for each?*
 - ▣ *Are there differences?*
 - ▣ *What are the synergies that could be leveraged to create a single plan that accompanies the transition back to the community?*
 - ▣ *How should these be conducted and coordinated in practice?*

Discussion: PCP Competencies in Context of Complexity

- How do PCP competencies change in complex conditions?
- How does complexity impact PCP competencies by care domain? Assume that multiple other conditions/co-morbidities exist in addition to:
 - ▣ *Intellectual and developmental disability (e.g., autism)*
 - ▣ *Mental disorders (e.g., dementia)*
 - ▣ *Traumatic brain injury*
 - ▣ *Older adults (e.g., frailty)*
 - ▣ *Blindness/deafness*
 - ▣ *Severe physical disability*

Next Steps

Committee Web Meeting Schedule

Timing	Web Meeting	Description
July 31, 2019 2:30 pm – 5:00 pm ET	Web Meeting #3	Obtain Committee input on draft core competencies of people performing PCP facilitation, and provide an update on the environmental scan and literature review. Discuss definition of PCP.
September 6, 2019 1:00 pm – 3:30 pm ET	Web Meeting #4	Present final core competencies of people performing PCP facilitations and gather Committee input on draft recommendations for system characteristics that support person-centered thinking, planning, and practice.
December 13, 2019 1:00 pm – 3:30 pm ET	Web Meeting #5	Adjudicate public comments received on the interim report and introduce the framework approach and development process.
January 6, 2020 1:00 pm – 3:30 pm ET	Web Meeting #6	Review and gather input on the draft measurement framework.
February 3, 2020 12:30 pm – 3:00 pm ET	Web Meeting #7	Finalize the draft measurement framework prior to public comment, and gather Committee input on the PCP research agenda.
June 1, 2020 1:00 pm – 3:30 pm ET	Web Meeting #8	Review public comments received on the draft comprehensive report.

Next Steps

- NQF will use Committee recommendations to expand environmental scan of core competencies for performing PCP facilitation
- Committee will convene meeting #3 on **July 31** where NQF staff will present a draft list of core competencies to which the Committee will provide feedback.

Contacts

- Project email: pcplanning@qualityforum.org
- Phone: 202-783-1300
- Project page:
http://www.qualityforum.org/Person_Centered_Planning_and_Practice.aspx
- SharePoint:
<http://share.qualityforum.org/Projects/PersonCenteredPlanningandPractice/SitePages/Home.aspx>
- Project alert subscription:
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Thank You for Participating!