Person-Centered Planning and Practice

NATIONAL QUALITY FORUM

Web Meeting #3

July 31, 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 **5148141**
  - If not speaking please mute your line *6 (*7 to unmute)

Joining a Web Meeting

Dial-in
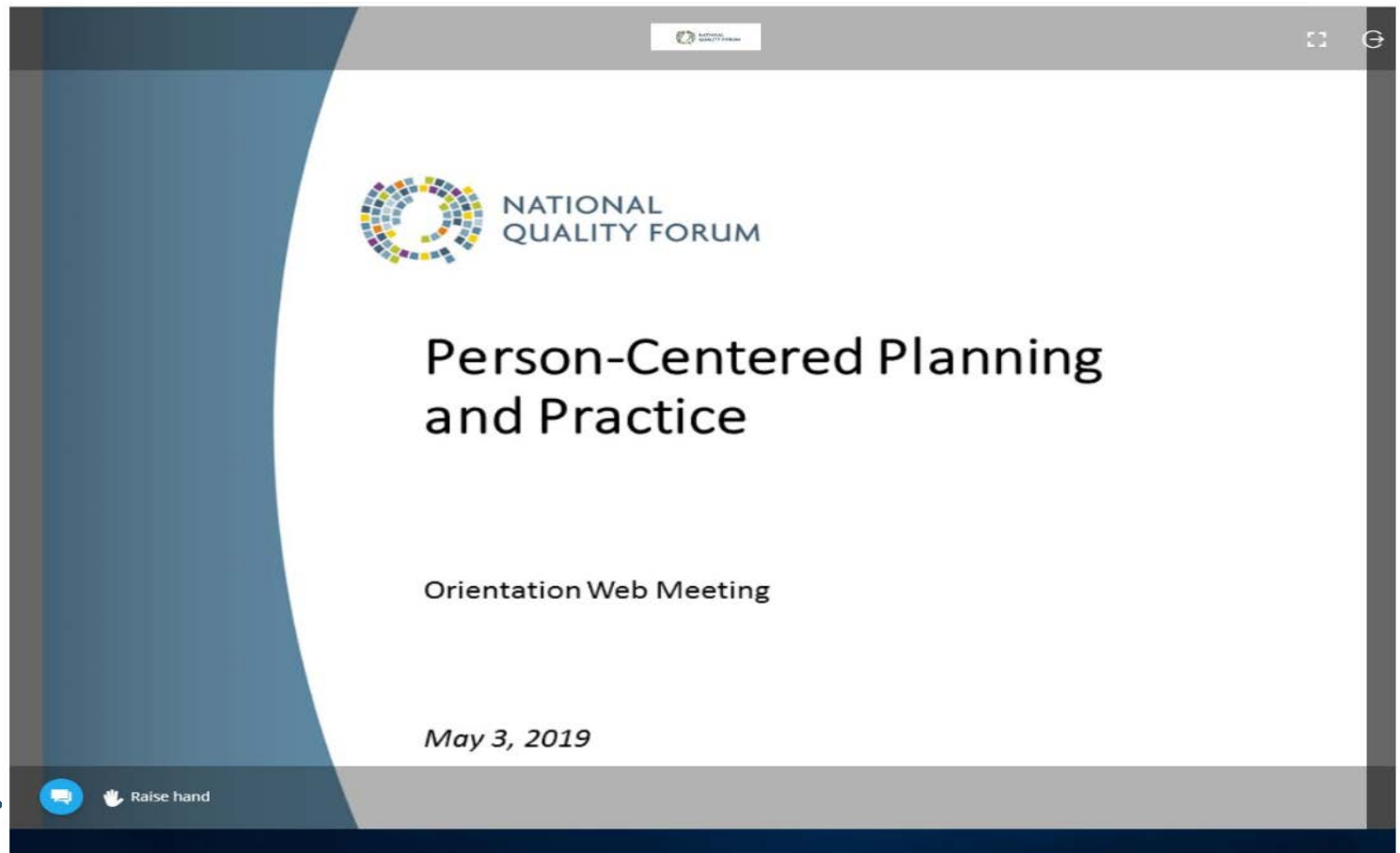- Audio (listening and speaking capabilities)
- No visual

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
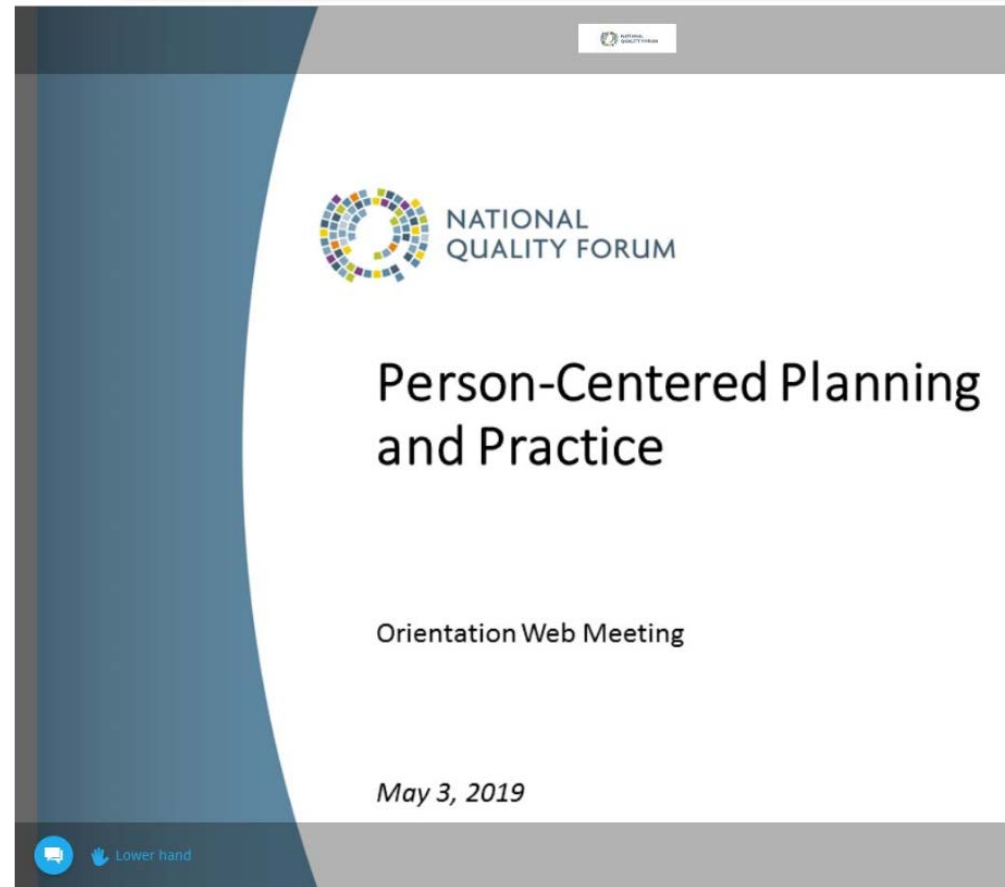
CenturyLink Features: Hand Raising — Participant View

- 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"

Discussion Guidelines

- Be respectful towards all opinions expressed

- Allow all opinions to be expressed

- Keep comments concise and focused

- Please refrain from duplicating comments and paraphrase when needed

- Indicate agreement without repeating what has already been said

- Avoid dominating a discussion and allow others to contribute

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 Committee

Co-chairs: Gretchen Napier MSHA, CMC; Cheryl Phillips, MD, AGSF

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

Introduce and welcome Committee liaisons

Committee discussion on process and feedback

Present draft core competencies of people performing PCP facilitation

Update on environmental scan

Project Timeline

May 3
Web
Mtg 1

July 31
Web
Mtg 3

Interim
Report
(Oct.)

Jan. 6
Web
Mtg 6

June 1
Web
Mtg 8

June 24
Web
Mtg 2

Sept. 6
Web
Mtg 4

Dec. 13
Web
Mtg 5

Feb. 3
Web
Mtg 7

Final
Report
(July)

May 2019

July 2020
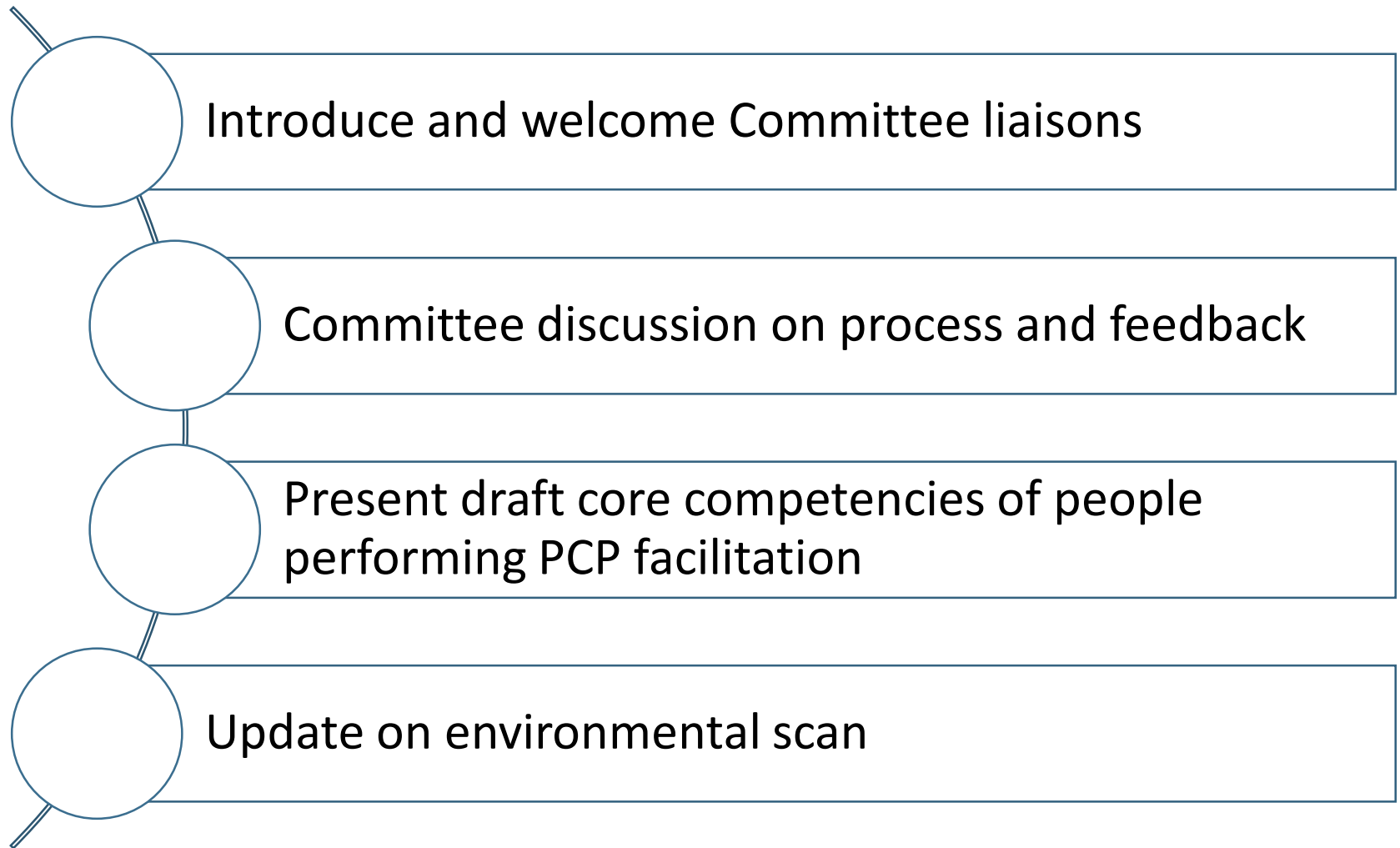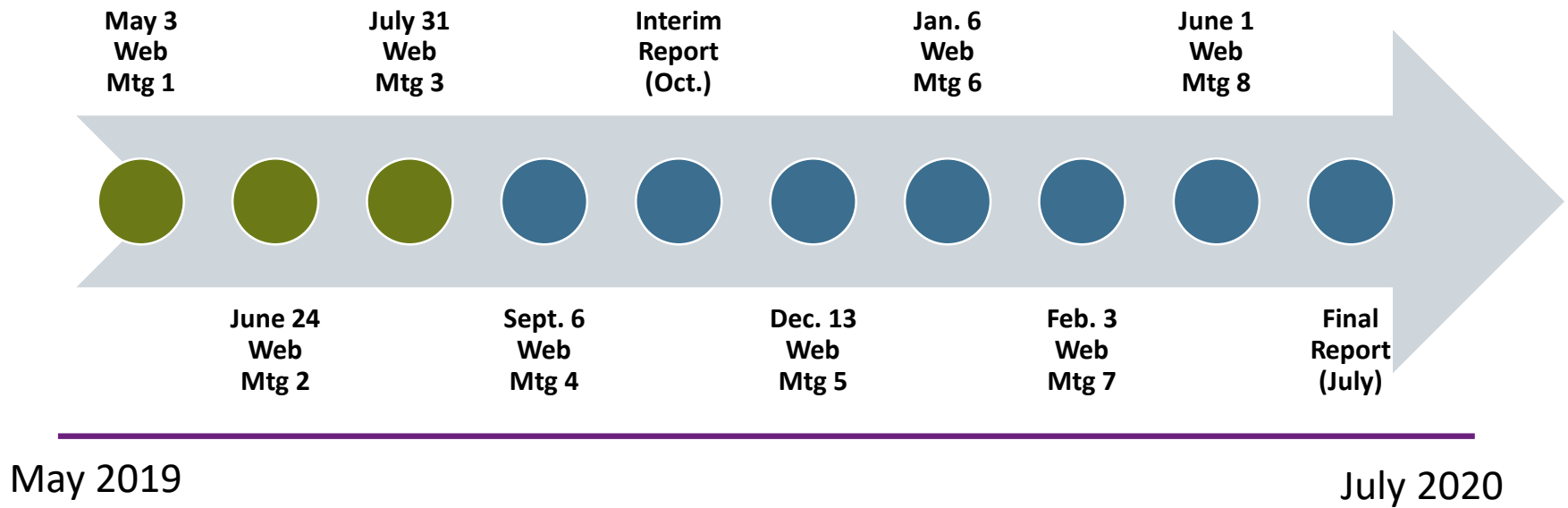
Person-Centered Planning and Practice Committee Charge

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;

- Conduct scan that includes historical development of person-centered planning in LTSS systems;

- Develop a conceptual framework for PCP measurement; and

- Create a research agenda for future PCP research.

Measure Scan Goals

A scan of existing person-centered quality of 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

Web Meeting Goals

Date	Objectives
Web Meeting #1 May 3, 2019	• Provide input on person-centered planning definition
Web Meeting #2 June 24, 2019	• Review environmental scan of PCP in LTSS
Web Meeting #3 July, 31, 2019	• Provide feedback on competencies of people performing PCP
Web Meeting #4 September 6, 2019	• Finalize core competencies for people performing PCP • Provide draft recommendations on systematic recommendations to support PCP

Web Meetings Goals (cont.)

Date	Objectives
Web Meeting #5 December 13, 2019	• Adjudicate public comments on interim report
Web Meeting #6 January 6, 2020	• Review draft PCP measurement framework
Web Meeting #7 February 3, 2020	• Finalize PCP measurement framework • Provide input on PCP research agenda
Web Meeting #8 June 1, 2020	• Adjudicate public comments on draft final report

Summary of Previous Meeting

- The Committee reviewed a list of PCP competencies broken down by foundational, relational, communication skills.

- Committee discussion focused on fundamental principles of PCP and additional competencies for consideration.

- The following themes emerged from the Committee discussion and public comments:

  - *Ability to gain knowledge of the individual's values, needs, and preferences.*

  - *Case load management skillset.*

  - *The concept of consumer control including self-direction and self-determination was addressed as part of self-determination.*

    - Additions suggested for skills, dignity of risk, and supported decision making, partnership of everyone involved.

  - *Unconditional positive regard for people.*

Committee Liaisons

Person-Centered Committee Liaisons

- **Daniel Fisher**, National Coalition for Mental Health Recovery

- **Pam Montana**, Alzheimer's Association

- **Penny Shaw**, Massachusetts Advocates for Nursing Home Reform and Disability Policy Consortium of Massachusetts

- **Mathew McCollough,** Office of Disability Rights Government of the District of Columbia

Role of the Liaisons

- Actively listen to Committee proceedings

- Be prepared to provide clarity and/or answer questions about work in their specific area of expertise

- Assist the Committee in achieving the goals of this project

- Are non-voting participants
  - *At the end of the project, the Committee will vote to approve the recommendations; the liaisons will not vote.*

Committee Feedback

Committee Feedback: Agenda, Slides, and Materials

- **Issue**: Committee members have questions about the content or meaning of some of the materials.

- **Proposed solution**: Dedicate the first 10 minutes of each meeting to answering Committee questions.

- **Issue**: Committee members would like to see the reference documents cited in the meeting materials.

- **Proposed solution**: NQF will post referenced documents on Committee SharePoint site.

- **Issue**: Committee members have questions or comments about the project that are not covered in the agenda or meeting slides.

- **Proposed solution**: Please contact NQF Committee staff directly to resolve concern via email or to set up a call to discuss

Committee Feedback: Participation on Calls

- **Issue**: Web meetings pose some challenges regarding participation. Not all Committee members are able to have their voice heard.

- **Proposed solution #1**: Create discussion questions that request feedback from different stakeholder groups (i.e., from a health plan perspective how can these core competencies be incorporated? Do they resonate with health plan goals?)

- **Proposed solution #2**: Divide members into subgroups and allow for time on the agenda for each subgroup to react to the materials.

Committee Feedback: Project Approach

- **Issue**: Committee members expressed concerns about the ability of the project to engage with varied communities and individuals that are experts in person-centered planning and practice

- **Proposed Solution #1**: During the interim draft report period October-November 2019, Committee members can engage in listening sessions with advocacy groups. Committee members will summarize feedback and report back to other members and NQF staff

- **Proposed Solution #2**: In addition to or instead of holding listening sessions, Committee members can send the draft report to their networks for feedback during the public comment period

Refined Draft Core Competencies for PCP Facilitation

Goal of Competencies

- States have asked for federal guidance on core competencies necessary to facilitate person-centered planning

- ACL in turn has requested feedback from this multistakeholder group to inform guidance to the states

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: Foundational Skills (continued)

- Supported decision making based on individual's needs*

- Informed decision making*

- Training and support for staff*

- Consumer control, i.e. self direction and self-determination*

- Effective freedom, i.e. factors that effectuate the successful implementation of an individual's freedoms and choices*

*Updates from last meeting are in red and marked with an asterisk.

Person-Centered Planning Competencies: Relational and Communication Skills

- Negotiation

- Dispute resolution

- Engagement skills

- Active/reflective listening

- Team building

- Customer service

- Identify individual's personal strengths and weaknesses*

- Empathetic listening*

*Updates from last meeting are in red and marked with an asterisk.

Person-Centered Planning Competencies: Philosophy

- Effective Freedom

- Recovery

- Empowerment

- Dignity of Risk*

*Updates from last meeting are in red and marked with an asterisk.

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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

- Case load management*

- Training and support for staff*

- Identifying process elements and experts*

- Identifying content elements and experts*

*Updates from last meeting are in red and marked with an asterisk.

Person-Centered Planning Competencies: Policy and Regulatory Context

- Human rights

- Olmstead

- Americans with Disabilities Act

- Independent living philosophy

- Social model of disability

Environmental Scan of Person-Centered Planning Measures

Measure Scan Goals

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

- Framework of PCP measure development

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Definitions

- **Measure concept:** An idea for a measure (or a description of an existing or potential assessment tool or instrument) that includes a description of the measure, including planned target and population.*

- **Performance measure**: A fully developed metric that includes detailed specifications and may have undergone scientific testing.*

*National Quality Forum. *A Roadmap for Promoting Health Equity and Eliminating Disparities: The Four I's for Health Equity*. Washington, DC: National Quality Forum; 2017.

Measure Scan Process

- Identified 15 search terms

- Searched 3 measure databases
    - *NQF: Quality Positioning System*
        - » Clearinghouse for NQF-endorsed measures
    - *CMS Measures Inventory Tool*
        - » Repository for quality metrics used by the Centers for Medicare and Medicaid Services (CMS)
    - *Qualified Clinical Data Registries*
        - » Measures collected and reported to CMS

- Searched PubMed and Google Scholar

Measure Scan Results

Identified 360 unique measures

Search Term	QPS	CMIT	QCRDs
		Database	
Person centered planning	19	12	0
Person centered thinking	0	1	0
Person centered decision making	1	0	0
Person centered practices	30	12	0
Personnel and Capacity	0	4	0
Clinical and Capacity	0	63	0
Hospital and capacity	0	49	0
Social work(er)	0	13	0
System and Capacity	0	73	0
Services Needs	24	0	0
Home- and community-based services	1	3	0
Long-term support and services	3	0	0
Patient experience	36	215	14
Caregiver Experience	9	28	0
Shared Decision Making	4	29	5

Measure Scan Results

- Scan returned no direct measures of person-centered planning

- Total number of measures identified: 366

- Directly relevant measures: 206

- Nonrelevant: 160

Measure Scan Themes

Relevant measure categories and measures identified:

- Patient experience

- Frequency

- Complex care

- Care transition

- Communication

- Shared decision making

Measure Scan: Gaps in Measures

Gaps in measurement:

- patient experience, communication, shared decision making, consumer directed care for:
  - *I/DD*
  - *Geriatrics*
  - *Chronic care*
  - *Mental and/or behavioral health*

Discussion Questions

- Are there specific places you go to find quality measures related to PCP?

- Are there measurement tools that need to be added to the search?

- Are there measures under development that should be acknowledged here?

History of Person-Centered Planning in LTSS

History of PCP in LTSS: Rationale

- Person-centered planning was developed through multiple co-occurring movements

- This has resulted in different approaches and philosophies in PCP, with a lack of standardization

- An understanding of the origins and current landscape of PCP could be helpful
  - *Recognizing and sharing best practices in PCP*
  - *Encouraging standardization and adoption of best practices*

History of PCP in LTSS: Goals

- Historical timeline of the development of PCP with major milestones
  - *Focus on social movement*

- *Quality Measurement*
  - *Organize measures for PCP*
  - *Capture gaps in PCP measurement*

- Create a research agenda for PCP based on historical evolution and gaps in measurement

Discussion Questions

How should the historical timeline be organized:

- By subdomains such as I/DD/Mental health/elderly

- By decades since 1960's

- By PCP-related efforts over time

Opportunity for Public Comment

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Next Steps

Committee Web Meeting Schedule

Timing	Web Meeting	Description
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 #4 on **September 6, 2019** where NQF staff will:

  - *Present the final list core competencies of people performing PCP facilitations*

  - *Gather Committee input on draft recommendations for system characteristics that support person-centered thinking, planning, and practice.*

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: http://nqf.informz.net/NQF/profile.asp?fid=2509

Thank You for Participating!