



## Person-Centered Planning and Practice Committee Web Meeting Summary

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The National Quality Forum (NQF) convened the Person-Centered Planning and Practice Committee for a web meeting on May 3, 2019. NQF discussed the Committee's charge and the background of the project. The Committee then reviewed the draft definition of person-centered planning and provided input.

### Welcome and Review of Meeting Objectives

Debjani Mukherjee, NQF Senior Director, welcomed the Committee and reviewed the following meeting objectives:

- Provide an overview of project scope and Committee charge
- Review and give input on draft operational definition of person-centered planning

Co-chairs Gretchen Napier and Cheryl Phillips introduced themselves and provided welcoming remarks to the Committee.

### Disclosure of Interests and Introductions

Elisa Munthali, NQF Senior Vice President of Quality Measurement, conducted disclosures of interest along with Committee introductions. Committee members provided brief introductions and disclosures. Sam Stolpe, NQF Senior Director, provided an overview of Committee roster selection methodology.

### Project Background and Committee Charge

Kate Buchanan, NQF Senior Project Manager, reviewed the project background and the Committee charge. The Committee is responsible for the following recommendations that will be finalized in a comprehensive report.

- Person-centered planning (PCP) definition within the home and community-based settings
- Core competencies of people performing PCP facilitation
- Recommendations for systems characteristics that support PCP
- Framework for PCP measure development
- Environmental scan and brief historical development of PCP in LTSS systems
- Research agenda for PCP

### Review Draft Definition of Person-Centered Planning

Ms. Mukherjee and Dr. Stolpe reviewed the draft definition of person-centered planning within HCBS. In its development of the draft definition, staff reviewed previous definitions, specifically, definitions developed in the 2016 NQF HCBS Committee final report, the final HCBS rule, and federal programs. Further, staff conducted a search of peer-reviewed articles, grey literature,

and state Medicaid programs. The draft definition took into consideration aspects of the planning process, person-centeredness attributes, provider categories, purpose/goal, resource allocation, and access.

## Draft definition of Person-Centered Planning

Person-centered planning (PCP) is an approach to facilitating the **assessment, planning, and coordination** of an individual's services and supports that is focused on the **individual's goals, needs, preferences and values**. The goal of PCP is to **optimize the individual's quality of life** through **consideration of personal preferences, health and safety needs, as well as resource allocation** including **access to services that facilitate HCBS**. Within PCP, the individual must be **empowered to make informed choices** that **lead** to the **development, implementation, and maintenance** of a **written service plan** for both **paid and unpaid services and supports**.

Plan

Person-Centeredness Factors

Providers

Purpose

Resource Allocation

Access

The Committee reviewed the definition and provided input on the definition by each of the components identified.

### Overarching

- Overall the Committee recommended that the language be less medical and more accessible to the general population.
- The Committee expressed some confusion about the purpose of the new definition and the context in which it would be used.

### Plan

- Many members found the term “assessment” confusing since many assessments are not evidence-based to ensure that they are person-centered. Further, the term “assessment” feels external to the process.
- The Committee wants to ensure that the language regarding the plan conveys that this is not a medical option but the integration of the person as a core aspect of the planning and that the person is directing the plan.
- A couple of members would like to add more language about the communication elements of person-centered planning which involves a lot of listening to and communicating with the person.
- The Committee recommended that the language make clear that the plan is not the end goal; the end goal is partnering with people so that they can live the lives they want.

### Person-Centeredness Factors

- Several Committee members stated the term “goals” can be stressful for people in their planning since they may not have goals. Suggestions for language include “achieving self-defined quality of life,” “wishes,” “desired outcomes,” “hopes,” “pursuit of meaningful life,” and “vision of a good life.”
- One member was unsure what the term “safety” refers to.
- Members suggested that instead of using the term “consideration” in terms of a person’s preferences make sure that the definition conveys that a person is directing the plan. Further, it is not just a person’s “preference” but their choice.
- Many noted that the definition should include language that reflects that the person brings their own abilities and resources to the planning process.

### Providers

- Members said that family support should be highlighted as key providers. But, one member stated that we should keep in mind that family can encompass a wide variety of people.
- Several members noted that providers can include community resources.
- There was a lot of discussion around the terms “paid” and “unpaid” services and supports. Some within the Committee wanted to change to “formal” and “informal” services and supports or a “circle of supports.” Others cautioned that terms such as “formal” and “informal” are nebulous.

### Purpose

- The Committee recommended using the NQF HCBS language to express that the purpose of person-centered planning is to ensure that a person can live the life they want to live.

### Resource Allocation

- Several Committee members stated that they would like to see the definition reflect the difference between a person’s resources and the community’s resources.

### Access

- Members recommended that “access to services that facilitate HCBS” should be reworded to “access to home and community-based services.”
- One member suggested including language about eliminating barriers to HCBS.

### Public Comment

NQF received numerous public comments. The comments fell into the following categories and recommendations:

- As a general recommendation for project as a whole, the public wants to empower individuals to live their preferred lives—what supports do the individuals need to accomplish their life expectations and to lead a good life as they choose to define it.

- Avoid terminology in the definition that invokes a medical need. Instead of focusing on the term “care,” (which is seen as a provider or medical model) the definition should focus on an independent living model. Additionally, “plan of service” in this community is an agreement between an individual and provider/system. Person-centered planning is not an assessment and should be approached as a life model.
- Craft the definition with both a person-centered focus and in plain language. Replace words such as “allow” and “individual” with “require” and “person” respectively. When outlining person-centered factors within the definition, incorporate the terms “preferred life,” “choice,” and “decision making.” Additionally, the definition should be spelled out in plain language such that both the person providing person-centered planning and the person participating/receiving person-centered planning can both understand it.
- Paid/unpaid versus formal/informal: The terms “paid” and “unpaid” offer clearer meaning to the general public than “formal” and “informal.” For instance, many people understand more easily that an “unpaid caregiver” can be a family member, neighbor, or friend, so “unpaid caregiver” is a more appropriate term than “informal caregiver.” Familial caregivers perceive the term “informal” to minimize their value in providing services and supports. For this reason, some national organizations, including the National Association of Social Workers avoid the term “informal.”

## Next Steps

Yvonne Kalumo-Banda, NQF Project Manager, introduced the project SharePoint site where Committee members can access meeting materials and relevant project documents and described how it works. The Committee was advised to send all project-related correspondence or inquiries to [pcplanning@qualityforum.org](mailto:pcplanning@qualityforum.org). A calendar of the Committee web meeting schedule was shared, and the public was told where to access this information and how to subscribe for the project alerts on the project page.

Following this web meeting, staff will incorporate Committee feedback on the PCP definition. In addition, staff will begin its environmental scan of core competencies for people performing PCP facilitation. The initial environmental scan results will be presented to the Committee for feedback during the next web meeting scheduled on June 24, 2019 from 2:00 pm to 3:00 pm ET.