

# New York Person-Centered Planning Statewide Training Initiative

## Home and Community-Based Services (HCBS) Participant Case Study Examples

### Service Sector: Aging

#### **Nora's Story**

Nora is a beloved elder in her community. Lately, she has not been seen at synagogue or any events in the area (she has always been fond of musicals and plays and attended the community theater as a regular for many years). At 89 years old, Nora is in the early to middle stages of dementia.

Related to her diagnosis, Nora receives PT once weekly, OT once weekly, and is being followed by a physician for the dementia medications Aricept and Namenda. In addition, Nora receives personal care services to assist her with her ADLs and IADLs. Nora's personal care services provider has just changed.

Nora is very much a representative of her generation. She is formal: always tries to be the embodiment of a "lady"; likes to dress up; use makeup; and she still insists on wearing a corset-like undergarment (she calls it a "machine"). Nora does not like to rush and prefers to be ready early for important events. She also expects people to call her Mrs. G. until she has gotten to know them and gives them permission to call her Nora.

Nora likes to spend time with her family, she likes to chat with people, see babies and small children, and go shopping for clothes and groceries. She likes to walk on nice days, enjoys riding in the car, and she likes to feel useful. She does not like crowded places.

Nora wants things to be neat and tidy and will try to pick up specks of dirt or lint if she sees them.

For reasons no one in Nora's life knows, and Nora does not reveal, Nora hates a shower or bath and prefers to wash with a cloth. Nora is shy and does not like personal assistance. However, she has difficulty undressing herself and cannot remove her undergarment. As a result, without assistance, she will sleep in her clothes. Nora also has trouble cleaning herself after using the toilet and this has resulted in urinary tract infections. Nora needs to be reminded to eat and drink fluids or she will become dehydrated. She can swallow but cannot cut her food and she drinks with a straw. Nora does not remember to take her medications or if she has taken them.

When Nora's new personal care services provider, Selena, comes to Nora's house the first day, she notices a one-page description for Nora on her refrigerator. As Selena reviews the one-page description, she notes that, until she is told otherwise by Nora, she is to call her Mrs. G.

Later that day, Nora tells Selena how much she appreciates that Selena addresses her in a respectful way. She also shares that she was never comfortable being called,

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“Miss Nora” by her former personal care services provider. She also reveals that, even though her home wasn’t as neat and tidy as she likes, she would often tell her former personal care services provider that it was perfect so that she would spend less time in Nora’s home.

Selena takes the opportunity to use the information Nora shares to ask questions and take notes about what works and what doesn’t work for Nora about the services Selena is providing. Selena is surprised to learn that Nora has been isolating herself from her family and friends because she feels embarrassed that her home is not as neat and tidy as she likes. She hasn’t gone out with her family to synagogue or the theatre because that would mean they would see her home when they picked her up. As a result, she has been quite lonely.

***Trainers, as you present this, you can highlight the following unique components to this scenario, such as:***

- 1. Nora’s preference for privacy***
- 2. Potential generational or cultural differences of formality or social norms***
- 3. The need to consider the balance between what is important to, with what is important for Nora, when addressing the risk of urinary tract infections***

### **Person-Centered Planning Process and Outcomes**

***Trainers, ask participants to identify the tools and skills that can be used to support person-centered thinking and practices in this scenario. If the ones below are identified, allow for further group discussion. If they are not identified, provide prompts to guide the discussion toward these bullet points:***

- ***Important to/for***
  - Selena discovers that, by not having one thing that is important TO her – having her home be neat and tidy, Nora is also missing out on other things that are important to her – spending time with her family and others and going to synagogue or the theatre. It is also important FOR Nora to have social connections and avoid social isolation.
  - Selena knows it is important TO Nora that she maintain her privacy. She also knows it is important TO Nora that she maintains neat appearances, both of her home and herself. It is important FOR Nora to maintain good health and avoid urinary tract infections. Selena has made a good start by acknowledging and respecting Nora’s preferences and establishing a rapport with her. Selena can use what she knows about Nora when she offers to provide support with cleansing after toileting. For example, she can let Nora know that this support is available and that it will allow Nora to maintain her personal cleanliness. She can also share with Nora that by preventing future urinary tract infections, she will be able to maintain her privacy by avoiding the process to be diagnosed which might feel intrusive. She can let Nora know that this will help avoid the discomfort associated with a urinary tract infection and the need for treatment of the infection. Broaching this topic will open conversation to alternatives to

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explore with Nora making decisions in the process of planning for her own care based on what is both important TO her as well as important FOR her.

- **Aging focus**
  - We see how Selena adapts to Nora's expectation that she be called Mrs. G until she gives permission to call her Nora. In this way, Selena respects the formality desired by Nora that is in-line with her generational culture.
- **Before we do anything, ask what we know**
  - Selena takes time to ask Nora questions and learn things about Nora that she would not have known if she hadn't taken the time to ask.
- **To teach outcomes**
  - Selena is surprised to discover that Nora has been avoiding friends and family because her home is not presentable in the way that is important to her. With Selena's efforts to provide services and support according to her preferences, Nora is treated with respect and can feel comfortable having people in her life come into her home, so that she no longer feels lonely. The outcome in this case could be that Nora's home will be presentable and clean as Nora prefers (important to) so that Nora can remain connected with her family and community (important to) and reduce her social isolation (important for).
- **Working / Not Working**
  - Selena identifies what is working and what is not working for Nora while conversing with her. This enables her to gain deeper insight into working effectively with Nora.

### Service Sector: I/DD

#### **Adam's Story**

Adam is a 19-year-old man who lives at home with his mother. His mother works at a laundromat and her work schedule enables her to be home when Adam returns from school. However, this means that she must be at work before Adam wakes up.

Waking up with his alarm and getting ready for school independently has, overall, been going very well. Adam says that he enjoys everything about getting ready for school on his own. He likes listening to his music as he gets ready and being able to play it loud enough that he can hear it as he moves from room to room. He also likes preparing his own breakfast in the morning. Adam wants to move out of his mom's house at some point and says that this helps him know what it will be like to get ready for work when he does move out.

Adam is really enjoying school now that the focus has shifted to getting a job and other skills he will need when he lives on his own. He is currently receiving support from his school through his IEP, his mother, and other important people in his life. He knows that when he graduates, he will make the transition to receive services and support through Home and Community Based Services. He and his best friend have talked

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about getting an apartment together, but Adam says he isn't sure if he wants to live with someone else or on his own. Adam loves watching movies and has a large collection of DVDs. His best friend also has a large DVD collection and Adam thinks it might be fun if they lived together and shared their movie collections.

One part of Adam's morning routine has been worrisome for Adam's mom. Without specific guidance, Adam sometimes picks out clothes that are either not sufficient for the weather or are too warm for the temperature. When asked, Adam says that he doesn't see that it's a big deal. He thinks it's sort of funny, but Adam's mom is worried that he could become sick or worse if he isn't able to make good choices of clothes. In the past, she tried to lay out clothes for Adam each morning before she left the house, but this made Adam extremely angry because he wanted to pick out his own clothes. This resulted in Adam ignoring his mother's clothing choices each morning and wearing what he picked out instead. When his mother saw that he ignored her choices, an argument generally ensued. Adam and his mother rarely argue but this is one issue that neither of them is willing to budge on.

At a meeting with Adam's teacher, Adam's mom had mentioned her worries about clothing choices. His teacher suggested that Adam watch the weather on the news each morning as part of his routine, so he'd know what to wear. Adam and his mom thought that was a great idea. This seemed like it was working until a few weeks later, during an unusually long cold snap. Adam went to school that morning wearing a T-shirt and lightweight hoodie on a day that the temperature never got above 38 degrees. This was a day when Adam volunteered with his class at a local recycling center. As a result, Adam spent several hours in a large warehouse setting with the garage doors wide open.

When Adam's mom asks Adam if he'd watched the weather report that morning, Adam tells her he had. He tells her that the report showed that it would be sunny that day without any clouds, so he thought he had selected clothes that would work. Adam tells his mom that he has been using the pictures (the sun, clouds, rain, etc.) to help decide what clothes to wear because the weather report is hard to follow. Adam and his mom both like the idea of him checking the weather each day so that he can pick out his own clothes but realize that they need to make sure it is a solution that works. His mother suggests that they can make a poster to put on the wall of his bedroom with temperature ranges and what clothing types should be worn within those ranges (e.g., 15 degrees to 30 degrees - heavy coat, thick socks, gloves hat, etc.). Adam likes the idea as that means he can still pick out what he wants to wear.

***Trainers, as you present this, you can highlight the following unique components to this scenario, such as:***

- 1. Adam and his mother having differing ideas of risks***
- 2. Benefit of evaluating the implementation of a plan to see if it is working***
- 3. Considering how a balance is identified that addresses what is important to and also what is important for Adam.***

**Person-Centered Planning Process and Outcomes**

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***Trainers, ask participants to identify the tools and skills that can be used to support person-centered thinking and practices in this scenario. If the ones below are identified, allow for further group discussion. If they are not identified, provide prompts to guide the discussion toward these bullet points:***

- ***Important to/for***
  - In this case, Adam and his mother are able to combine what is important TO Adam with what is important FOR Adam. It is important to Adam that he makes his own clothing choices each day. It is important for Adam to dress in clothes that are appropriate for the weather.
- ***Choice and control***
  - By Adam and his mother having an active role in identifying solutions, they are able to identify what works best for them.
- ***Balancing risk***
  - Informed decision-making allows Adam and his mother to balance the potential risks that may arise from Adam's increased independence. Once they have all of the information, they are able to make a decision that works for both of them.

## **Service Sector: Mental Health**

### **Carl's Story**

Carl is 38 years old. He recently moved into an apartment after experiencing homelessness for many years. Prior to moving into his current apartment, Carl had difficulty with taking his medications consistently. Not taking his medication consistently led to challenges such as altercations with people and involvement with the judicial system. For a long time, Carl's source of support was predominantly made up of people who were also homeless. He feels that the strong bond he forged with his friends when he was homeless is one that he must always honor.

The first day they met, Carl told his care manager how important the friends he made when he was homeless were to him. He talked about how his group of friends looked out for each other and shared what they had with each other. With assistance, Carl found a job that he found rewarding. Carl's care manager assisted Carl in finding and moving into an efficiency apartment that was near public transportation for Carl to get to his job. A month or two after moving into his apartment, Carl starts to miss work and miss appointments with his care manager and other supports in his life. When they meet, Carl's care manager observes that Carl has not been bathing, shaving, wearing clean clothes, or brushing his teeth. When asked if he is taking his medications, Carl says that he stopped taking them.

When asked why he's stopped taking his medication and missing work, Carl explains that his friends are staying with him because they need a place to stay. He reminds his care manager how it is important to him to share what he has with his friends. The same friends have been telling Carl that he doesn't need to take his medication and that he can get a better job. Carl also says that he gets distracted sometimes and forgets to

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take his medication. Carl and his care manager talk about how Carl will not be able to pay rent for his apartment if he loses his job. Carl shares that he wants to stay in his apartment but that he also wants to help his friends out. He also says that he likes his job and the people he has met at work.

Carl and his care manager work out a plan so that Carl is able to take his medication consistently, using a medication dispenser that has an alarm on it. They also work out a plan for Carl to be able to strike a balance between maintaining his friendships while remaining in his apartment and keeping his job. Carl identifies ways to help out his friends other than letting them stay in his apartment.

***Trainers, as you present this, you can highlight the following unique components to this scenario, such as:***

- 1. Carl clearly expressing what is important to him***
- 2. Carl's care manager's responsiveness to Carl's priorities***
- 3. How Carl is able to make a decision that works for him when he has all the information of benefits, potential risks, etc.***

### **Person-Centered Planning Process and Outcomes**

***Trainers, ask participants to identify the tools and skills that can be used to support person-centered thinking and practices in this scenario. If the ones below are identified, allow for further group discussion. If they are not identified, provide prompts to guide the discussion toward these bullet points:***

- ***Communication chart***
  - Developing a Communication Chart allows those people who support Carl understand how best to support him during challenging times.
- ***Important to/for***
  - By taking the time to hear from Carl about what is important TO him, Carl and his care manager are able to develop a plan that ensures those needs are met. In order to accomplish those goals, certain steps are taken to address what is important FOR Carl, as well.
- ***Matching***
  - Because Carl's care manager is a good match for Carl (he understands both what is important to and for Carl and he helps Carl make informed decisions), Carl is able to navigate situations that come up.

### **Service Sector: Children**

#### **Cassie's Story**

Cassie is nine years old and lives with her mother, father, her younger brother, and the family's dog. Cassie is extremely social. Unlike her brother, she loves going to school and looks forward to the end of the weekend so that she can go see her friends again. Cassie's friend group consists of her entire class and several students in the other classroom in her grade. It is not uncommon on the walk home from school for Cassie to tell her mother about a new friend she made that day. Cassie's social confidence and

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the pleasure she gets when she interacts with other people extends beyond socializing with her peers. One day, she proudly told her mother how she suggested that she could help a substitute teacher by showing her friends how to complete the day's Math worksheet. Cassie said that the substitute teacher made her the Assistant Substitute Teacher!

Cassie is diagnosed with Type 1 Diabetes and has her insulin levels checked several times a day. When she is at school, Cassie goes to the school nurse to have her insulin levels checked and when she's home, either her mother or father checks her insulin levels.

Cassie's biggest desire this year has been to go to a sleepover at a friend's house. She knows that several of her classmates have been able to go to sleepovers and she tells her parents frequently how much she would love to sleep at a friend's house. Cassie's mother has consistently told Cassie that she is not sure that going to a sleepover is a good idea. When asked why, Cassie's mother explains that she needs to check Cassie's insulin in the evenings. Plus, she worries that Cassie will eat food that she is supposed to avoid. Her mother also worries that at a sleepover, very little sleep actually happens, and Cassie's pediatrician has stressed the importance of good sleep habits to help maintain healthy insulin levels.

Privately, Cassie's mother hopes that Cassie's interest in sleepovers fades away. She feels confident that, as Cassie gets older, she will be able to manage her needs independently and that sleeping over at a friend's house will not pose a risk. In the meantime, she thinks she will have to decline any invitations Cassie receives.

By the time Cassie receives an invitation, her mother realizes how hard it will be to decline. This sleepover is for all of the girls in the fourth grade and Cassie is convinced that she has to go. Cassie's mother realizes that she should explore if there is a way Cassie can go to the sleepover. Unsure how to proceed, she reaches out to the Social Worker at Cassie's Endocrinologist to see if she has any suggestions. Working with the Social Worker, Cassie's mother develops a plan that addresses her concerns while enabling Cassie to go to the sleepover.

Cassie's mother calls the mother hosting the sleepover and explains that she would like to accept the invitation and that Cassie has Type 1 Diabetes and would need some support to attend. Together they make a plan for Cassie's mother to come by the house when it is time to check Cassie's insulin levels. Cassie's mother will prepare snacks for Cassie to enjoy. The mother hosting the sleepover also tells Cassie's mother that she has found that, while the girls often talk about wanting to stay up all night, having them get into their pajamas and sit on their sleeping bags by 8 o'clock, means that they typically fall asleep on their own within thirty minutes. Cassie's mother shares what some indicators will look like if Cassie's insulin levels are off. For example, if she becomes aggressive toward others, that can be an indicator that her insulin levels need to be checked. The host mother agrees to call Cassie's mother if she sees any of these

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behaviors. Having addressed all of her concerns, Cassie's mother realizes that Cassie will have accomplished her goal of going to a sleepover.

When Cassie's mother tells Cassie of the plan she has developed that allows Cassie to go to the sleepover, Cassie is ecstatic. She tells her mother that having her own snacks at the party and having her mother come over to check her insulin levels is no big deal. She just wants the chance to go to the sleepover. Cassie's mother realizes that she did not have to wait until the barriers she perceived went away. She is able to address them while helping her daughter meet her goal.

***Trainers, as you present this, you can highlight the following unique components to this scenario, such as:***

- 1. Identifying a solution that addresses what is important to both Cassie and her mother***
- 2. Cassie's mother making a decision with the help of information from an expert***
- 3. Clear communication with the mother hosting the sleepover addressing Cassie's mother's concerns***

### **Person-Centered Planning Process and Outcomes**

***Trainers, ask participants to identify the tools and skills that can be used to support person-centered thinking and practices in this scenario. If the ones below are identified, allow for further group discussion. If they are not identified, provide prompts to guide the discussion toward these bullet points:***

- ***How important it is to include people (like families) in planning***
  - Many people are involved in helping Cassie successfully attend the sleepover – her mother, the Social Worker at her Endocrinologist's office, the host mother, and Cassie.
- ***Important to/for***
  - In this case it is important TO Cassie that she be able to attend the sleepover and it is important FOR Cassie to attend the sleepover safely. By reaching out for support from the social worker, Cassie's mother is able to find a balance between what is important to Cassie with what is important for Cassie.
- ***Like and Admire***
  - Identifying what people like and admire about Cassie helps identify those characteristics that are unique and important to Cassie. For example, Cassie places high importance on social interaction. Being able to be with her friends takes priority for Cassie so she is very open to solutions that enable to her to be safe while socializing.
- ***Matching***
  - In this case, Cassie and her mother both want essentially the same thing, but it looks different to each of them. Cassie wants to go to a sleepover and doesn't mind that there are things put in place so that she can attend. The host mother is a good match in this case because she is receptive to Cassie's needs and the solutions that enable her to join the sleepover.



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- ***Communication chart-including visible physical symptom of diabetes for Cassie***
  - Her mother initially thinks that she needs to wait until Cassie is older and more independent to be able to attend a sleepover. By consulting with the Social Worker, Cassie's mother is able to develop a plan that works for both her and Cassie. That plan includes identifying and sharing a list of indicators that mean Cassie's insulin levels are off. Developing a communication chart for future social opportunities would allow Cassie and her mother to share this information with other people who can help and support Cassie.

### **Service Sector: Traumatic Brain Injury**

#### **Melinda's Story**

Melinda is 47 years old and has a reputation as the go-to woman at her office. She has her finger on the pulse of operations and facilities management of a very large company. She has a moderate traumatic brain injury (TBI). She did not work for several months after the accident that caused her TBI. Melinda recently went back to her job and is experiencing a few challenges there. Some of her work responsibilities include completing cubicle assignments and their corresponding paperwork, ensuring IT equipment and appropriate software are set up for new hires, helping set up the conference rooms for meetings, and providing coverage at the front desk when the Receptionist is out or needs additional assistance.

Melinda's desk is in a cubicle in a large open area of the office. It is near the breakroom and printer/copier so there are often a lot of people near her desk. Before her TBI, Melinda enjoyed having her desk in the middle of the hustle and bustle of the office. The sound of conversations, opening and closing of the breakroom door, and printer/copier running used to fade into the background while Melinda worked. Now, however, Melinda discovers that she struggles to focus on her work within this noisy environment. During the afternoon it is especially loud, so Melinda tries to get as much work done in the morning as possible. She finds that some days she is so exhausted after working that she struggles to stay awake on the bus ride home.

Melinda is acutely aware of the amount of time she was away from her job after her injury. Everyone at the office has been extremely supportive of her and solicitous about any needs she might have now that she has returned. Melinda appreciates and values their concern and worries that the time she spent away from work caused a burden on her co-workers. She does not want to make any requests for support or assistance for fear that it will add to others' workload or possibly even negatively impact her job.

Melinda started working with a Vocational Rehabilitation Counselor, Becky, as she transitioned back to work. Becky is a firm believer in the value of her role and prides herself on being a fierce advocate for the people she supports. Shortly after Melinda returned to work, Becky checked in with her to see how the transition was going. Melinda started to speak of some of her challenges and Becky immediately sprang into

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action. She started speaking of accommodations such as having a new desk in a different area and other modifications. Melinda became fearful that Becky was going to start putting things in place that would make Melinda feel awkward with her employers and coworkers or, worse, make them feel resentful of her. She quickly told Becky that she wanted to wait a bit to see if things improved before any changes were made. In the meantime, she resolved to find a way to deal with her struggles and not say anything more to Becky about them.

Now that some time has passed, however, Melinda finds that her situation at work is not improving. In fact, she is starting to fall behind because some of the tasks she is responsible for now take longer for her to complete than they used to and she is unable to get them done before the noise level increases near her cubicle. To try to resolve the situation by herself, Melinda has been staying late at work trying to get everything caught up when it is quiet, and she can focus more readily. As a result, she has been getting home late each night and feels that she isn't able to fully rest from her day before she must go back to work.

The next time they meet, and Becky asks Melinda how work is going, Melinda shares her frustrations and worries about keeping up with her responsibilities. She tells Becky that she expected her adjustment back to work to go more smoothly. They talk about Melinda staying late and her struggles with the noise levels at her desk. Becky realizes that she was not fully aware of Melinda's experience returning to work. With Melinda's permission, Becky starts asking specific questions and documenting the information Melinda provides. It's during this conversation that Becky learns how important it is to Melinda that she remains in her current cubicle. She doesn't want to move to a quieter location in the office because that will make her feel isolated. However, it has become clear to Melinda that staying in her current cubicle is not working as she isn't able to work effectively with the noise level.

Because she has a clearer idea of Melinda's situation, Becky suggests that there may be options that can strike a balance for Melinda. Her suggestions of potential options to consider include noise reduction earphones, moving to a quieter workspace as needed while keeping her primary cubicle, or even adjusting work hours. Becky assures Melinda that these are just ideas she is thinking of, not that they are solutions she will try to implement. She wants Melinda to know that there are a variety of solutions that they can identify and that together they can explore what Melinda prefers. Melinda isn't sure that she likes all the suggestions Becky offers her, but she is relieved to think that there might be a way to strike a balance that works. Melinda tells Becky that she does not want to wear headphones, but the possibility of having a quieter workspace to use, as needed, is appealing to her. She also tells Becky that she would like to think about adjusting her work hours, depending on how things proceed. They agree that the option Melinda prefers is the one that Becky will help Melinda pursue with her supervisor.

***Trainers, as you present this, you can highlight the following unique components to this scenario, such as:***

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1. *Becky providing solutions without knowing what works and what doesn't work for Melinda*
2. *Melinda's decision to resolve issues on her own and not share with Becky*
3. *Recognizing that there are many possible solutions to a challenge*

## Person-Centered Planning Process and Outcomes

***Trainers, ask participants to identify the tools and skills that can be used to support person-centered thinking and practices in this scenario. If the ones below are identified, allow for further group discussion. If they are not identified, provide prompts to guide the discussion toward these bullet points:***

- ***Important to/for***
  - Melinda and Becky work together to consider the things that are Important To / Important For Melinda with regard to her work. This enables them to identify potential solutions to help Melinda's return to work go more smoothly.
- ***What's Working / Not Working***
  - When Becky learns that Melinda has been struggling at work, she utilizes PCP tools to help identify What's Working / Not Working for Melinda at her job. This helps Becky gain clarity on Melinda's preferences.
- ***Outcomes***
  - Using the information from above helps to identify Melinda's desired outcome. So that Melinda can maintain the things that are important to her, specifically keeping up with her work while remaining an integral part of her office community, Becky will help identify support options that are important for Melinda, such as providing opportunities for working in quiet spaces and/or quiet times.
- ***Matching***
  - This example highlights the importance of a good match for people. In this case, there was a time when Becky was not a good match for Melinda, causing Melinda to keep to herself significant stressors at her job.
- ***Possible 4+1***
  - Melinda and Becky can use the 4 + 1 technique to help focus on what has been learned and identify potential next steps. By looking at what has been tried, what was learned, and what they are pleased about and concerned about they can identify next steps based on what they learned.

## **Service Sector: Physical Disability**

### **Gerry's Story**

Gerry is 50 years old and is a part of a tight-knit group of friends. He's known some of them since he was in high school. Friendship, and the ability to regularly spend time with friends, is extremely important to Gerry. He has shared with his care manager that

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since he had his stroke, seeing his friends has become even more of a priority for him. Gerry and his friends have some traditions within the group for social activities they do together. Most members of the group “own” one of the events. Gerry’s event is to host the Super Bowl party at his house. Another tradition he shares with some of his friends is to go out to brunch at different restaurants on Sundays.

Gerry had a stroke about one year ago and has been receiving Physical Therapy, Occupational Therapy, and Speech Therapy since that time. He uses a cane when he is out in the community. It is important to Gerry that people give him time to respond to questions or to participate in conversations and not rush from topic to topic too quickly. Gerry has not driven his car since he had his stroke. He has some limitations with the use of one of his hands.

Gerry does not share with his care manager and therapists how much he misses being able to drive himself places. His mother and father have been very willing and supportive when he needs a ride somewhere. Gerry’s friends also have been able to pick him up and take him places. Gerry values the support he has received from his family and friends. However, he really enjoyed driving from the time he received his driver’s license. In particular, he enjoyed getting up on Sunday mornings, deciding with his friends where they would meet for brunch, and then driving himself to the restaurant. Being picked up and taken to the restaurant by someone else means that Gerry doesn’t enjoy brunch with friends as much. In fact, as time goes on, Gerry finds that he doesn’t even want to go to brunch because it ends up affecting his mood all day afterwards. He ultimately cancels on his friends every week for several weeks. He makes up excuses, but he knows the real reason is that he stopped enjoying brunch because it reminds him that he isn’t driving anymore. Gerry’s care manager and therapists are unaware of Gerry’s desire to drive again until one Monday his PT asks him how his weekend was, and Gerry’s response is, “awful.” When asked why it was awful, Gerry shares his frustration at not being able to drive anymore and how it has ruined his weekend brunches.

Gerry’s therapist suggests that Gerry might benefit from an assessment to determine if there are adaptive steering options available to him so that he can drive again. Once he is assessed by a certified professional, it’s determined that Gerry is able to drive using a specialized knob on his steering wheel. With this equipment in place, Gerry is able to drive himself places again – in particular to Sunday brunch every week.

***Trainers, as you present this, you can highlight the following unique components to this scenario, such as:***

- 1. Discovering what isn’t working for Gerry by asking about his weekend***
- 2. How a potential solution is readily available when the therapist learns of a need***
- 3. The value of recognizing routines that are important to Gerry***

### **Person-Centered Planning Process and Outcomes**

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*Trainers, ask participants to identify the tools and skills that can be used to support person-centered thinking and practices in this scenario. If the ones below are identified, allow for further group discussion. If they are not identified, provide prompts to guide the discussion toward these bullet points:*

- **Good Day/Bad Day**
  - Listening and identifying **GOOD DAY vs BAD DAY** is a tool that assists Gerry's support system to help him find a solution.
- **Rituals and Routines**
  - Learning what parts of rituals and routines are important to Gerry yields information about what supports are needed for Gerry to participate in his preferred rituals and routines.
- **Important to/for**
  - Gerry is receiving some of the things that are both **Important TO** and **Important FOR** him. However, over time, it becomes evident that, in order to have good days, modifications need to be explored that allow Gerry to drive himself places.