“Why would I ever want a normal review again”?

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“All the information for the boring statutory review was there, it wasn’t just ticking boxes, it was a plan for the future.”
Person Centred Reviews in Adult Services

Gill Bailey, Helen Sanderson and Charlotte Sweeney
with Belinda Heaney
Acknowledgements

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Person Centred Reviews are based on person centred thinking tools. Person centred thinking tools were developed by the Learning Community for Person Centred Practices. www.learningcommunity.us

For more information on person centred thinking and person centred reviews, please go to www.helensandersonassociates.co.uk or email info@helensandersonassociates.co.uk
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Summary of the report

Person centred reviews were developed to transform the Year 9 transition review in schools. As the Valuing People Support Team’s national training programme was rolled out, people quickly realised that this person centred approach to reviews could be equally powerful within adult services. The Valuing People Support Team also funded programmes in the North East and North West to discover:

- How person centred reviews could be used in day and residential services (in the North East, and in partnership with Inclusion North).
- How information from person centred reviews could be used to inform strategic commissioning in three local councils (in the North West, and in partnership with the North West Training and Development Team).

In addition, a provider working in the North West evaluated what people using services thought about the person centred review process, and compared this with their experience of traditional reviews.

The outcomes from these three pieces of work, as described in this report, demonstrate that:

- Person centred reviews can lead to changes for individuals and services, and meet statutory requirements.
- Person centred reviews can replace existing statutory reviews as they generally take the same amount of time and involve the same people.
- Information from person centred reviews can provide important information to contribute to strategic commissioning.
- People who use services, who were part of the study, preferred person centred reviews to traditional reviews.

For people and their families, person centred reviews hold the individual at the centre, focuses on what matters to them, and directly results in change to their lives.

The recommendation from this report is that information about person centred reviews be considered for inclusion in citizen leadership programmes.

For providers, person centred reviews usually take no more time than is already being invested in reviews, and create meaningful actions for change. Each person centred review generates a one-page profile which is the beginning of a person centred plan. Therefore, using person centred reviews accelerates the development of person centred plans throughout an organisation, as required by Valuing People Now.

The recommendation from this report is that providers consider replacing traditional reviews with person centred reviews.
For commissioners, information from person centred reviews can be aggregated to inform strategic change. This is a way to genuinely co-produce commissioning.

The recommendation from this report is that care managers and health professionals use person centred reviews, and that information from these reviews is systematically aggregated to inform strategic commissioning.

“It’s better, it’s all about me.” Matthew

“All the information for the boring statutory review was there; it wasn’t just ticking boxes, it was a plan for the future.” Ellen

“It was informal, really relaxed and all about what Phil wants, a refreshing change.” Derek, a dad

“This information is being used, instead of just filed away until the next meeting.” A day centre officer

“Service users and carers have reported this to be a more uplifting, empowering, fun and powerful reviewing method in comparison to their experience of periodic process which was tedious, inconsistent and focussed on blue pieces of paper and not ‘me’.” A care manager
Part 1: Introduction

1.1 Background

Person centred reviews were initially developed in education to transform the Year 9 transition review by ensuring that the young person was fully at its centre, with actions that made a difference to their life. After the first person centred reviews at a school in Hull, the Valuing People Support Team organised successful pilots in four London boroughs which led to a national roll-out of the approach. A full description of the evaluation of the national programme can be found in the Valuing People Support Team Person Centred Transition Reviews by Alison Wertheimer (2007).

As a result of the success of the national programme, Valuing People Now requires that a person centred review be undertaken for every young person from 14 -19 years of age. People involved in the national programme quickly saw that this person centred approach to reviews could be equally powerful within adult services.

The person centred review process is a way of gathering together the people that are important in a person’s life, and together creating actions for a better life. The process takes an hour and a half, and focuses on what matters to the person, what support they need and what is working and not working in their life now, from different perspectives. Person centred reviews encompass the person centred thinking tools developed by the learning community for person centred practices. The focus is on the inclusion of the person and their family, breaking away from some of the ‘traditional’ aspects of a service review, with the intention of creating a clear and sustainable action plan (see Appendix 1 for a description of the person centred review process).

For people and their families, person centred reviews hold the individual at the centre, focus on what matters to them, and directly results in change to their lives.
For providers, person centred reviews usually take no more time than is already being invested in reviews but create meaningful actions for change. Each person centred review generates a one-page profile which is the beginning of a person centred plan. Therefore, using person centred reviews is a way to accelerate the development of person centred plans throughout an organisation. If everyone supported in a service already has an annual review then, by replacing these reviews with the person centred review process, a provider can have the building blocks of person centred plans in place for everyone. This information is invaluable when developing individual service funds and for self directed support.

Providers can also aggregate this information (using the process outlined in Part 3 of this report) to learn what is working well in the service and what needs to change. One national provider used this process to develop their annual strategic plan.

For commissioners, person centred reviews can lead to much better intelligence about what really works for people, what community resources need to be supported and what new, innovative services need to be developed in response to what people want now and for the future.

### 1.2 Person centred reviews and delivering Putting People First

Putting People First establishes clear expectations for personalisation and mainstreaming person centred planning. To deliver the vision set out within Putting People First, we need to know:

- What is important to the person?
- How they want to be supported.
- How they want to be in control of their life and their future.
- How they communicate this and make decisions.
- What needs to change?

Person centred reviews make a significant contribution to delivering personalisation. A person centred review is a way to capture what is important to the person, how they want to be supported and what they want for the future. This is the basis for self directed support and personalisation. For a further description of how person centred reviews can help deliver personalisation see Appendix 2.

### 1.3 Person centred reviews and delivering Valuing People Now

Valuing People Now requires that:

Local authorities and their partners to build capacity around person centred approaches and planning so that all people with learning disabilities and their families have support to develop plans which identify what is important to them now and in the future, and support and services that are informed by their person centred plan. Valuing People Now, page 57.

Person centred reviews are a way to deliver this key recommendation. A person centred review is an example of a person centred approach and the information from a review can be the foundation of a person centred plan.
1.4 The Valuing People Support Team commission two person centred review projects

The Valuing People Support Team extended their support of person centred reviews by commissioning two programmes in 2007 to explore the potential of person centred reviews in delivering personalised services and informing commissioning.

Paul Davies, Valuing People Support Team Regional Advisor in the North East, commissioned a training and support programme from HSA to use person centred reviews in day and residential services. This programme was in partnership with Inclusion North.

Dave Spencer, Valuing People Support Team Regional Advisor in the North West, wanted to explore how we could use the information from person centred reviews to inform strategic commissioning in three local councils. This work was developed in partnership with the North West Training and Development Team.

This report describes what has been learned from these programmes and reflects on other initiatives using person centred reviews nationally.

“Feel very strongly that there are going to be many positive things that happen in Rowland’s life now as he is here telling us what it is he wants” Anna, day centre staff
2.1 Introduction to the North East Programme
In the North East Region the Valuing People Support Team and Inclusion North wanted to explore the use of person centred reviews in day and residential services. The programme was delivered by HSA and used three different person centred reviews. These are known as:

- The Working/Not Working Review
- The Important To/For Review
- The Citizenship Review

For information on the three review processes please see Appendix 1.

This review programme ended with a Celebration Day in April 2008 to share what was learned, celebrate success, identify any barriers to using person centred reviews and to think about the next steps. The content of this report from the North East is taken from that day.

2.2 The programme in the North East
HSA delivered a training and support programme over eight months, teaching the three different review processes to twelve people. Each participant was supported to deliver two reviews over this period resulting in twenty-four reviews. In some localities participants are now using the new review processes for all review meetings.

We worked with people who undertook statutory and informal reviews as part of their existing role. These were:

- Care managers/social workers.
- Care service officer (employment).
- Person centred planning co-ordinator.
- Community nurse.
- Day service staff.
- Outside agencies and providers.
- Community access network staff teams.
- Independent living and housing support teams.
- Other services (residential and short break).

Participants first attended the three-day training on person centred thinking and the Working/Not Working and Important To/For Reviews. Each participant then facilitated a review using this process with a person who receives support in their area. Participants
were each coached to facilitate a review in their workplace by the trainer and were given individual written feedback.

The group met to reflect on their experiences with their first review and to consider when the review processes could be useful in their roles. Participants described how, as a result of the training, they were starting to use person centred thinking tools in their work. Social workers described how they had already begun to develop one-page profiles with individuals at initial assessment, and day services staff were using sessions to prepare person centred information for the reviews.

The next stage was training for the citizenship review process with participants being coached to facilitate their first Citizenship Review. The programme ended with the Celebration day in April 2008 at which the recommendations included in this report were generated.

2.3 What did people think of the process?
People who use services in the North East describe the reviews as an empowering experience.

“I liked it. The best bit was community life.” Philip talking about his Citizenship review

“It’s better, it’s all about me.” Matthew

Family members felt that their voices were heard and that the process put their son/daughter right at the centre.

“It was tremendous how everything was laid out, the comments were excellent.” Geoff

“An awful lot of positives, I always go on about the negative in relation to Chris and I now realise that things have got to change.” Erica, family member

“I thought ‘Oh My God’ to begin with, but now it’s finished it’s really easy and all there.” Elaine

“It saves a lot of time rather than everyone talking, you have an immediate record, more concrete and focussed on Jenny.” Jenny’s Dad
“Awful lot of positives – feel like I always go on about the negatives and things should change, thank you.” Erica

Care managers were very positive about the process:

“It gave choices about what direction to take.” Neil

“Shared information on what he wanted, rather than what he was being told.”

“It was much more positive and shared good things about Phil and his life and what he wants - better than the ones (reviews) I do.” Michael

“Great to see that we all want to support Chris on the same path.” Michelle

Day centre staff describe how these reviews mean that they learned about people in a different way, often in much more depth:

“Much better than the standard review, much more colourful and you had time to judge all the information that was there.” Gary

“Feel very strongly that there are going to be many positive things that happen in Rowland’s life now, as he is here telling us what it is he wants.” Anna

“Really, really good. Sharon got a lot from her review, feel like I’ve got to know her much better too.” Wendy

“The way it’s formatted and the way knowledge is pulled together throws up opportunities for the future, openings of lifestyle for Ross!” John

“More informal but so much more work has come from it and it felt really enjoyable.” Roy
2.4 What differences did the person centred reviews make?
The reviews made a difference to the lives of people on various levels. One way to think about change is to identify Level 1 and Level 2 changes. Level 1 changes are those that individual workers can make with the people they support, that directly change the person’s life. These changes could be day to day changes for people, or major life changes. Level 2 changes are those that require adaptation or change to policies or procedures (including the use of resources).

2.5 Level 1 changes resulting from the reviews
These three stories from the North East illustrate the kind of Level 1 changes made through the programme. These apparently small changes were significant for the people concerned, and are changes in personal power and self-direction.

Leanne felt confident enough during her review to raise the issue that staff were entering her room without knocking. This was resolved at the review meeting. Leanne was actioned to identify a key worker at home that she felt comfortable with and that her person centred plan was to reflect the importance of this. Leanne shared at the celebration day that this worked for her as no-one is entering her room without knocking.

Paul really wanted a girlfriend to go out with and “do new things and have nice meals with like my brother does.” At his person centred review he told people that he could not get a girlfriend because he was not able to go out much as he needed staff to go with him. Paul talked about Joan, a woman he loved spending time with at the Gateway Club. One of the actions from his person centred review was that Paul would work with Sam, his key worker at the group home, to develop his relationship circle and think about his community connections. Paul and Sam used the relationship circle to think about who were the important people in his life, and this led to actions to support Joan and Paul to meet at other times as well as at the Gateway Club. Paul and Sam are now members of the local drama group and they are thinking about how they can get more involved and make a contribution to the club. As a result of his review Paul now has a girlfriend and is part of the drama club. Paul said, “Dating Joan is the best thing that ever happened to me, all [because] of my review.”

Ross had his review in November during which he said that one of the things he really enjoyed was watching rugby on the television, and that he would love to have a season ticket for the Newcastle Falcons (his favourite team) and to go and watch a game at their ground. This was a real achievement for Ross as he is a very gentle, quiet, shy young man who finds it difficult to talk in large groups of people.

Ross is extremely proud of the fact that he became a Newcastle Falcons season ticket holder a few days after his review. Ross goes along to the rugby with two people who are not paid to spend time with him and since regularly attending home games he has begun to make some new friends. He is also a lot more confident when he talks to people about the games he attends and his passion for the sport is evident. Had Ross not had a person centred review his desire to attend games as a season ticket holder at his favourite club may never have been identified and it is very likely he would still be watching rugby on the television.
2.6 Level 2 changes resulting from the Programme

As a result of the programme there have been four Level 2 changes made at a system level. These are:

- Changing the paperwork to reflect the reviews.
- Developing booklets with the individual that shares information from the reviews, and leads to the third change.
- The booklets are being used by people and staff as a way to stay focussed on what is important to people and make sure that the actions happen.
- Information from reviews is being used to develop person centred plans.

All staff felt that the process met the statutory requirements and delivered much more information. North Tyneside changed their existing paperwork to reflect the new person centred review process (Appendix 3). In Enfield, London, care managers have made similar changes to their paperwork and have re-designed their IT system to support the use of the person centred review process by all their care managers.

This is not simply a change in paperwork. Staff developed individual booklets for people that captured the information from the review (Appendix 4). In North Tyneside the information is now being used, instead of being filed away until the next review. The booklets are being attached to the statutory review as well as being sent to the people who attended. Most importantly, the people themselves have a copy which many choose to carry around to prompt people of where they are up to and remind them of what needs doing.

“The booklets are a great way of reminding people what is important to and for the person they are supporting. It supports the person to have ownership of their review and is a way of saying that the information that has been shared in the review has not been recorded only to be filed away. The booklets take very little time to complete as all the information is collated on the day and is just transferred to the booklet template. This is done wherever possible with the person as it again encourages the person to have ownership and control of their own review!” Lindsey, day service worker, North Tyneside

Lindsay described how after a little trial and error with the first booklet it now takes about 20 - 30 minutes to put one together and how they try to build this into day service sessions with the person.

This process defines what is important in the person’s own terms. It enables the things that really matter to the person to be advocated for in such a way that meets the Fair Access to Care (FACS) criteria for substantial and critical need.
Each person has ownership of their booklet, which is kept with them and used to support them in discussing what is important to them and how they can achieve the things that they identified as important in their review.

Information has been shared with other people who support or are important to the person. The review booklet is presented in a format that people understand and can relate to. It is also used with the person on a monthly basis at individual planning and development meetings. The person’s booklet ensures that they are kept as the focus and that the things that are important to them and for them are not forgotten.

Staff are now working to capture the information from person centred reviews and work with people and their families to further develop the information into a person centred plan. Christopher’s story illustrates this:

A person centred plan is currently being developed with Christopher who recently had a person centred review. Christopher is gradually beginning to use a short break service and one thing identified by Chris and the people at his review was that the team who will be supporting him during his stays at the short break service do not know him very well. The short break staff find it difficult to understand the way he conveys his wishes and preferences as he has a very individualised form of communication.

Since his review, the teams that support Chris have begun to work more closely together in order to provide consistency and continuity for him. Chris, and the people he has chosen to support him to do that, are currently developing a person centred plan from the information gathered at his review.

2.7 What is happening next in the North East?
The Level 2 changes mentioned earlier in section 2.6 describe changes that are made across the service systems. In addition, staff are realising how the review process influences the way in which they deliver more person centred services. Here are some examples:

- A life coaching model is being used in day services through modular sessions where people have the opportunity to think about the different aspects of their life and to develop one-page profiles which grow and evolve over time into living descriptions, making a difference to people as they grow.
- In some areas care managers are starting to develop one-page profiles at assessment.

The next steps for change across the North East are to:

- Make this approach available to everyone supported in the region.
- Learn from the review information to inform organisational and commissioning change. This process is described in the next part of this report.
Part 3: North West Region - Using information from person centred reviews to inform service development and strategic commissioning

3.1 Introduction to the North West Programme
In October 2007 the Valuing People Support Team began working on a programme with Cheshire, Warrington and Halton to support care managers to use person centred reviews, and to link the information from these reviews to strategic commissioning and service development. Valuing People Now expects that person centred planning and approaches will be used to inform service delivery and commissioning strategies. This programme explored how using information from person centred reviews can achieve this Valuing People Now expectation.

Each authority had a training programme for care managers, and each care manager was offered coaching for their first person centred review. Commissioners and care managers then met together to explore a process for taking information from individual reviews and how this can inform local provider change and strategic commissioning. This process has started being used in Cheshire, Warrington and Halton.

3.2 The Programme in the North West
Twenty-five care managers, social workers and a speech and language therapist participated in person centred review training and an additional twenty managers and other stakeholders participated in an awareness day.

The participants in the person centred review training were supported to do their first person centred review, again through coaching with individual written feedback.

In April, the commissioners, with care managers and team managers from the three authorities, came together to review progress and to aggregate information from the reviews to inform commissioning and provider development and to plan next steps for each authority to extend this work.

3.3 What did care managers and health professionals think of using the review process?
The process was described as empowering and a significant improvement.

“Christopher indicated pleasure with claps and smiles and he stayed! Good to get all the communication stuff down and planned as very important for Christopher.” David
Care managers used the review process to ensure that personal outcomes were being met.

“The working/not working part of the review are the checks that we use to see if personal outcomes are met.”

The person centred review generated more information and led to greater accountability.

“I want to use these headings, they are more valuable. They cover a lot more of what we need, only in a much better way.”

“The review is a clear record of what we promised to do. The person can chase us out with the actual sheets of paper that we have signed up to if we don’t deliver.”

Some care managers suggested it made their job easier and more satisfying.

“It made my job easier. Once I got used to handing over some of the responsibilities of thinking about solutions to the group, they became much more creative in their problem solving.”

“There is a shared responsibility in getting things right. People don’t automatically look to the social worker.”

Time was not seen as an issue.

“The criticism about time comes more from people who haven’t tried it yet and their anxieties and perceptions of the review. They need to try it for themselves.”

See Appendix 5 for the reflections of a commissioning manager on person centred reviews.

3.4 How did the process work?
The aggregation process uses information from individual reviews to inform strategic change. Each review generates information about what is working and not working for the person (and from other perspectives).

Aggregating what is working:
- Informs commissioners of what is going well that can be built on and extended.
- Shows providers what they are doing well, that they can continue and develop further.
Aggregating what is not working:
- Informs commissioners of what they need to ensure is changed in future contracts and commissions.
- Gives providers priorities for service development.

Aggregating what is important to people in the future:
- Provides commissioners with vital, detailed information to inform their commissioning strategy.
- Tells providers what they need to be offering in the future.

The process involves gathering together the stakeholders who will be using this information to create change. The group then takes the information directly from the person centred review record and transfers it onto individual cards: green for what is working, red for what is not working and blue for what is important to people in the future.

The graphic opposite is a summary of this process for going from person centred reviews to strategic change.

This process was used in Halton where 15 reviews had been facilitated by the care managers and the speech and language therapist. The information this generated was useful for both the providers and the commissioners.

A speech and language therapist said “person centred reviewing is in my opinion invaluable.” To read more of her personal perspective on person centred reviews see Appendix 6.

A care manager said “these were the two most successful reviews that I have ever completed, and now several months later they still have their effect; brilliant!” To read more about how a care manager used the person centred reviewing process see Appendix 7.

To read how a care manager sees social work and person centred reviews see Appendix 8.

A commissioner commented that “...it took no longer than a traditional review - the meeting uses time efficiently by cutting out a lot of the talking people do and staying action focused.” To read about a commissioners perspective of the process see Appendix 5.

Information from 15 people provides an excellent snapshot, however, it is a small percentage of the actual people served in Halton. Halton will be repeating this process using the information gathered from more reviews at the beginning of 2009. This process provides a powerful way to take what individuals tell us about their lives in person centred reviews, and identify common themes that can inform strategic change.
From Person Centred Reviews to Strategic Change

Change

Person Centred Review

Actions for Individual Change

Working

Not working

Important for the future

Themes

What can we do to build on these and extend to more people?

What needs to change?

What do we need to change for the future?

Strategic Action Plan

Local Action Plans
3.5 How else is the ‘From Person Centred Reviews to Strategic Change’ process being used?

The process of aggregating information about what is working and not working for individuals is being used and developed in a range of contexts:

- Every child at Ellen Tinkham School in Devon has a person centred review. The head teacher, teaching staff, the local commissioner, educational psychologist, social workers, and the personalisation manager came together and used this process to inform the school’s development plan and the transition planning and protocol.
- The national ‘Getting a Life’ project that focuses on transition and young people getting paid work is using this process to inform local and national strategic development. The process has been adapted to gather information from young people about the work they want to do in the future, and this is being used to inform local work initiatives.
- A national provider applied this process in each of the four regions to inform local strategic planning, and then used the aggregated information to inform annual business planning.
- This process was used in Birmingham as part of the consultation process for changing day centres. Sixty-nine reviews were independently facilitated, and the information was aggregated to inform the strategy. Each review also created individual actions for change with the person and their family.

3.6 What is happening next in the North West?

Partnership Boards in Lancashire are planning to use this process and take information from person centred reviews to inform their strategic commissioning. This will also provide an opportunity to explore and develop how Partnership Boards can use this information, and see where it can connect with Joint Investment Plans.

Much more positive and focused on the good things about Philip and what he wants - better than the ones I do!" Michael, social worker
Part 4: What people who use services have said about person centred reviews

Belinda Heaney, Inclusion Co-ordinator North West, United Response

4.1 Introduction to the evaluation study
For the last two years United Response have been using person centred thinking tools with the aim of becoming a more person centred organisation.

In the North West Division a series of training events and leadership and coaching groups were held regularly. These events have enabled key people in the division to learn about and share person centred thinking tools, to practice positive and productive meetings and to spread our learning throughout the North West Division.

One of the ways we have been using the tools is to facilitate person centred reviews for the people we support. All of the coaches and leaders had training in facilitating these reviews. We wanted to evaluate what people who use services thought about person centred reviews and how they compared to traditional reviews. The aim of this section of the report is to share the feedback from the people we support about how this worked for them.

4.2 How the information was gathered
The information was gathered in a small part of the division in Lancashire and Merseyside. I visited individuals and their support teams with a questionnaire (Appendix 9). People had not seen the questions prior to my arrival but knew that I was going to ask about their reviews. I had asked supporters to prepare with people before I arrived which is an essential aspect of inclusive good practice.

It had been agreed in the division that the two area managers would identify a number of people who had experienced a person centred review. In advance of my visit those identified were sent a letter asking if they wanted to participate (Appendix 10). People chose where they would like to talk to me; everyone chose their own home.

I spoke to nine people, eight from Lytham St Anne’s and one from Liverpool. All of the information was gathered face to face. Two people spoke to me independently of any support. The rest needed full support from staff and, in two cases, parents.

People showed me documentation and photographs from their reviews. Everyone who took part received a £10 voucher as an expression of thanks.

4.3 What did people tell me?
From the results, it seems that people found the experience much better than their previous more traditional reviews. The table below illustrates this.
Person Centred Reviews in Adult Services

Better than last year % | The same as last year % | Worse than last year %
---|---|---
Was the preparation… | 66.66% | 33.33% | Nil
Was the meeting… | 88.88% | 11.1% | Nil

Details of what people said are recorded in the tables on pages 23, 24 and 25.

For the people we support, staff and family, I have sorted the information into the “working and not working” layout for the three key aspects of the review: preparation, the meeting and the action plan.

Overall, people felt that to obtain the depth and quality of information gathered at this stage, preparation was the key. Using tools and booklets really affected the action plans for the better.

All people felt they were included during the meeting and this made a big difference to their participation. Some people had never been involved before and it was a huge achievement for them to stay at a two-hour meeting.

Clearly many more things were working than not working and this shines a positive light on the person centred review process. However, there are key matters which need to be addressed in the ‘not working’ area. For example, a parent, used to being in full control of her son’s support, struggled to participate and recognise the value of him taking more control of his life. It is absolutely essential that we can engage with this relative so that she can be part of the journey too. The fact that what was not working was highlighted by the review is another positive as it gives us the opportunity to take affirmative action.

On the whole the people we support, their families and those who support them, found the style positive and a better way to have a review.

The action plans had mostly been completed because they clearly identified timescales and the person responsible. All the actions were achievable.

These are the verbatim comments that people made about getting prepared for the review, during the review and after the review.
## Getting prepared

<table>
<thead>
<tr>
<th>Working</th>
<th>Not working</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inviting the people I wanted to be there.</td>
<td>Venue changed at short notice and I had to travel to Wigan.</td>
</tr>
<tr>
<td>Preparing room, food and music; it was like a party.</td>
<td>I was a bit unsure about the planning (key worker).</td>
</tr>
<tr>
<td>Filling in [the] booklet [Listen to me] and getting family members to fill one in too.</td>
<td>We needed more time to plan properly.</td>
</tr>
<tr>
<td>Prepared things to help me on the day, like slips of paper to stick on the charts.</td>
<td>Mum refused to fill booklet in.</td>
</tr>
<tr>
<td>Went out and met social worker before [the meeting].</td>
<td></td>
</tr>
<tr>
<td>Had regular short meetings with my staff to help me plan.</td>
<td></td>
</tr>
<tr>
<td>Prepared with care manager. It was good.</td>
<td></td>
</tr>
<tr>
<td>Thought about what to talk about and who to invite.</td>
<td></td>
</tr>
<tr>
<td>Thought about what I liked and didn’t like.</td>
<td></td>
</tr>
<tr>
<td>More planning worked - we knew more before the meeting.</td>
<td></td>
</tr>
<tr>
<td>Prepared pictures and drama.</td>
<td></td>
</tr>
</tbody>
</table>

"Great, really enjoyed it, it makes you think of everything”
## During the review

<table>
<thead>
<tr>
<th>Working</th>
<th>Not working</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone was involved.</td>
<td>Not enough space at the meeting.</td>
</tr>
<tr>
<td>Enjoyed the music and biscuits.</td>
<td>Mum felt she had to put things up on flip charts.</td>
</tr>
<tr>
<td>Dad talked much more than usual.</td>
<td></td>
</tr>
<tr>
<td>Easier to talk about things that needed talking about.</td>
<td></td>
</tr>
<tr>
<td>Relaxed open atmosphere; nicer meeting.</td>
<td></td>
</tr>
<tr>
<td>Focussed on positives rather than problems.</td>
<td></td>
</tr>
<tr>
<td>Good to get messages across.</td>
<td></td>
</tr>
<tr>
<td>'J' stayed throughout the meeting.</td>
<td></td>
</tr>
<tr>
<td>It's ok to talk about what I wanted to talk about.</td>
<td></td>
</tr>
<tr>
<td>It wasn’t at the office; it was at my house.</td>
<td></td>
</tr>
<tr>
<td>Everyone wrote on the flip chart.</td>
<td></td>
</tr>
<tr>
<td>Having my one-page profile there and some pictures of things I had been doing.</td>
<td></td>
</tr>
<tr>
<td>Hearing what people liked and admired about me.</td>
<td></td>
</tr>
<tr>
<td>'B’ knew it was about him and stayed for the whole meeting.</td>
<td></td>
</tr>
<tr>
<td>It reassured my sister and she enjoyed being part of it.</td>
<td></td>
</tr>
</tbody>
</table>

### After the review

<table>
<thead>
<tr>
<th>Working</th>
<th>Not working</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action plan identified responsible people.</td>
<td>I don’t know much about the plan.</td>
</tr>
<tr>
<td>Easier to keep on track with action plan.</td>
<td></td>
</tr>
<tr>
<td>Action plan [was] met within weeks of [the] review.</td>
<td></td>
</tr>
<tr>
<td>‘A’ had never had an action plan before.</td>
<td></td>
</tr>
<tr>
<td>Action plan done in a table [format] and has changed the way we do shift reports.</td>
<td></td>
</tr>
<tr>
<td>Plans are being used to make changes.</td>
<td></td>
</tr>
<tr>
<td>It was a better plan because I was doing the talking.</td>
<td></td>
</tr>
<tr>
<td>The action plan is in the office. The manager, key worker and community nurse had to do things.</td>
<td></td>
</tr>
<tr>
<td>I was going to see my mum, [doing] the hoovering and going to Cleevely.</td>
<td></td>
</tr>
<tr>
<td>People are more accountable to complete actions.</td>
<td></td>
</tr>
<tr>
<td>The plan has benefited ‘M’s well-being and health.</td>
<td></td>
</tr>
<tr>
<td>The plan meant more because the information we had gathered was better.</td>
<td></td>
</tr>
</tbody>
</table>
Part 5: Conclusions and recommendations

5.1 What did the two programmes show?

In the North East programme, the people who use services, family members and staff were very positive about person centred reviews. This supports Belinda Healey’s findings in an evaluation carried out with people who use services provided by United Response. People said that person centred reviews were a better, more empowering process, and still met statutory requirements. Most importantly, the North East programme led to Level 1 and Level 2 changes, that is, changes in people’s lives and in the ways that services are delivered.

In the North West programme, commissioners found that information from person centred reviews was an efficient and effective way to hear what people thought about their services and what they wanted for the future. This is one way to co-produce commissioning and hear what people think and want. There are other national examples of successfully using the person centred review process to inform strategic change.

The outcomes from these programmes demonstrate that:

- Person centred reviews can lead to changes for individuals and services, and meet statutory requirements.
- Person centred reviews can replace existing statutory reviews as they generally take the same amount of time and involve the same people.
- Information from person centred reviews can provide important information to contribute to strategic commissioning.
- People who use services prefer person centred reviews to traditional reviews.

5.2 What does this mean for delivering Putting People First and Valuing People Now?

Implementing person centred reviews in services can make a significant contribution to delivering Putting People First and Valuing People Now in the following ways:

- A person centred review is a way to capture what is important to the person, how they want to be supported and what they want for the future. This is the basis for self directed support and personalisation.
- A person centred review addresses the Valuing People Now requirement for using person centred approaches within services.
- A person centred review generates a one-page profile, which is the foundation of a person centred plan, another Valuing People Now requirement.
5.3 What are the recommendations for future action?

For people and their families, person centred reviews hold the individual at the centre, focuses on what matters to them, and directly results in change to their lives.

The study at United Response illustrated that people found it helpful to have opportunities to prepare for their person centred review. Ways to create those opportunities could include:

- Further developing the booklets and other materials that people can locally adapt, as in the North East.
- Providing time and support in services for people to prepare for their person centred reviews. Self-advocacy groups or person centred planning facilitators could offer this support on an individual or group basis.
- Time and support for family carers to prepare if they want to.
- Information for people and their families about what is possible and what is available locally. There is a DVD for young people in transition that shows what is nationally possible under the six keys to Citizenship (ref). Some person centred planning coordinators have developed sets of information about what is available locally, using the keys to Citizenship as a framework.
- Person centred reviews in citizen leadership programmes.
- Opportunities for family carers to train and be paid to facilitate person centred reviews.
- Opportunities for people who use services to offer peer mentoring and support to others (to prepare for their person centred reviews).

For service providers, person centred reviews usually take no more time than is already being invested in reviews but create meaningful actions for change. Each person centred review generates a one-page profile which is the beginning of a person centred plan. Therefore, using person centred reviews is a way to accelerate the development of person centred plans throughout an organisation, as required by Valuing People Now. It would take a relatively small amount of training and support to enable providers to replace the traditional in-house reviews with person centred reviews. As United Response has shown, the potential impact of this change is considerable, both in empowering people, and the person centred actions that result from well-facilitated reviews. Person centred reviews generate information that could form the basis of Individual Service Funds. In Lambeth they linked person centred reviews in transition with individual budgets with good results.

For commissioners, information from person centred reviews can be aggregated to inform strategic change. This is a way to genuinely co-produce commissioning. Therefore if care managers and health professionals were systematically using person centred reviews, then the information from these reviews could be regularly aggregated to inform strategic commissioning.
The recommendation from this report is that care managers and health professionals use person centred reviews, and that information from these reviews is systematically aggregated to inform strategic commissioning.

Some local authorities, like Tameside, have already made the commitment to ensure that everyone they serve has a person centred review to move towards self directed support, and this information is aggregated to inform strategic change. We hope that this report will generate discussion about the role person centred reviews can play in the delivery of the transformation of adult social care.
Appendix 1

Description of person centred reviews

Helen Sanderson

Introduction
Most services have some form of regular review, to look at how we are supporting someone and what needs to happen next. There are day service reviews, care managers reviews, health professional’s reviews, annual reviews, transition reviews, person centred planning reviews and Individual Education Plan reviews. We have been looking at how reviews can be more person centred and as well as setting actions, how they can be used to gather information that can be developed into ‘living descriptions’ of how people want to live.

There are three kinds of person centred reviews being used with adults and children. They are a. the ‘Working/not working’ Review b. the ‘Important to/for’ Review and c. the ‘Citizenship Review’. This paper briefly describes the format and purpose of each type of review, and then summarises the difference between and person centred plan and a person centred review.

a. The ‘Working/not working’ Review

This review is based on the person centred thinking tool ‘working and not working from different perspectives’ developed by the learning community for person centred practices.
**Purpose**

- To explore what is working and not working from the individual’s perspective, the families perspective and the staffs perspective. This can also include ‘others’ perspective, for example, health professional, care manager or connexions worker.
- To agree actions that maintain or increase what is working and change what is not working.
- To look at what the ‘working and not working’ information tells us about what is important to and for the individual, and to begin to develop a living description.

**Time**

- One hour minimum.

**People**

- The individual.
- Their family.
- Staff.

**Examples**

- This review process is being used by care managers to review individual contracts and placements.

**b. The ‘Important to/important’ for Review**

This review is based on the person centred thinking tools ‘important to/important for’ and ‘working and not working from different perspectives’ developed by The Learning Community for person centred practices.
Purpose

- To gather information about what people like and admire about the individual, what is important to them now, what is important to them for the future, and what support they want and need.
- To explore what is working and not working from the individual’s perspective, the families perspective and the staff’s perspective. This can also include ‘others’ perspective, for example, health professional, care manager or connexions worker.
- To agree actions that maintain or increase what is working and change what is not working, and what needs to happen to develop this information into a living description.

Time

- One and a half hours minimum.

People

- The individual.
- Their family.
- Staff.

Examples

- This review is used as the Year 9 Transition review in schools, and in day centres and supported accommodation services as a way to begin a person centred plan.

c. The ‘Citizenship Review’

This review is based on the Keys to Citizenship (Simon Duffy) and usually follows the ‘important to/important for review’. 
**Purpose**

- To explore what is possible for individuals, under the 6 keys to citizenship.
- To prioritise and choose which of the 6 areas to focus energy and action on.
- To look at what is possible locally for each of the chosen areas.
- To action plan next steps towards citizenship for the individual.

**Time**

- One and a half hours minimum.

**People**

- The individual.
- Their family.
- Staff.

**Examples**

- This review is used as the Year 10 Transition review in schools

**Person centred reviews and person centred planning**

<table>
<thead>
<tr>
<th>What?</th>
<th>Person Centred Planning</th>
<th>Person Centred Review</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A way of working out what is important to and for the person, now and in the future.</td>
<td>A different way to do reviews.</td>
</tr>
<tr>
<td></td>
<td>Developed in partnership with family and friends, and leading to change.</td>
<td>Using person centred thinking tools and the principles of person centred planning to ensure that everyone is heard, and that there are shared actions with a bias towards inclusion.</td>
</tr>
<tr>
<td></td>
<td>There are different styles of person centred planning, for example PATH, MAP and Essential Lifestyle Planning.</td>
<td>Fulfils statutory requirements.</td>
</tr>
<tr>
<td></td>
<td>The plan belongs to the person. Information can be used by care managers/providers, if the person agrees.</td>
<td>Information collected at a person centred review could be developed further into a person centred plan.</td>
</tr>
</tbody>
</table>
### Person Centred Planning vs Person Centred Review

<table>
<thead>
<tr>
<th></th>
<th>Person Centred Planning</th>
<th>Person Centred Review</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who?</strong></td>
<td>Whoever the person wants to invite.</td>
<td>The people who ‘have’ to be there and other people the person wants to invite.</td>
</tr>
<tr>
<td><strong>Where?</strong></td>
<td>Where the person wants it</td>
<td>Where the person wants it within the limitations required by the service.</td>
</tr>
<tr>
<td><strong>When?</strong></td>
<td>Major decision points in a person’s life - whenever they want to plan.</td>
<td>At Year 9 review, at the Year 10 review, and can also be used at annual reviews.</td>
</tr>
<tr>
<td><strong>Why?</strong></td>
<td>Create a shared understanding and make changes.</td>
<td>Create a shared understanding, meet service requirements and lead to change.</td>
</tr>
</tbody>
</table>

The above table summarises the differences between person centred planning and person centred reviews, however, there are two fundamental similarities. Both should have the person fully at the centre, lead to change, include families, promote inclusion, and create living descriptions of how the individual wants to live.

### From person centred review to person centred plan

Person centred reviews are a way of developing more person centred and responsive services, and developing living descriptions of how people want to live. These living descriptions can be developed into person centred plans. This could be an important way to begin essential lifestyle plans, as by starting to gather information through a review means that we are able to start to gather information and change peoples lives (by developing actions at a review) and then develop this information further into plans that evolve and lead to ongoing change. The ‘Citizenship Review’ stretches our ideas about what is possible, and creates a framework for people to imagine a better life. This could lead to a PATH, where the individual can bring together the people in their life to dream and plan for change.
Appendix 2
How person centred reviews can be used to deliver personalisation

What do we mean by personalisation?
Personalisation is the process by which the state provides services that are adapted to suit individuals.

In ‘Putting People First’ it states that “By signing this historic protocol, we accept our shared responsibility to create a high quality, personalized system which offers people the highest standards of professional expertise, care, dignity, maximum control and self determination”.

Putting People First talks about the importance of high quality personally tailored services. It says “In the future, we want people to have maximum choice, control and power over the support services they receive.”

What needs to be in place to be able to deliver personalized services?
We need to know:

a) What is important to the person, so that services are built around what matters to them as an individual, not seeing people as a label, condition or stereotype.

A person centred review captures information about what is ‘important to’ someone.

b) How the person wants their supports or services delivered - how, when and where, rather than a standard ‘one size fits all’ approach.

A person centred review captures information about ‘how best to support’ someone.

c) How the person communicates how they want their services to be personalized. If the person does not use words or is under the mental capacity act, we need clear ways to make these decisions and judgements, and to record them.

Information from person centred reviews can be developed by adding communication charts and decision making agreements.

d) How we are doing in delivering personalized services - what individuals think of services.

A person centred review identifies what is working and not working for the person and actions are set from this.

Gill Bailey and Helen Sanderson
Appendix 3

Original paperwork from a review with information from the person centred review added in

---

**CARE PLAN REVIEW FORM**

**NAME:** TONY SMITH  
**ADDRESS:** Mr  
16 Lilly GROVE  
NEWCASTLE UPON TYNE  
TYNE AND WEAR

**POST CODE:** NE23ZT  
**TEL:** 01912092662  
**DATE OF BIRTH:** 23/04/1958

**COST CENTRE:** LearnDis  
**BUDGET CODE:** 1MK50/E798  
**DATE OF REVIEW:** 29 November 2007 (written)

**DATE CARE PLAN COMMENCED:** 9 July 2007

**PROVIDER:** Ridgehill  
**CONTACT REF:** Michelle Black  
23 Ringwood Terrace  
Gosforth  
Newcastle  
**TEL. NO.:** 280000000270

**CARER:** Ann Smith  
**ADDRESS:** 24 Green Crescent  
High Bank  
Wallsend  
**TEL. NO.:** 0191 2000047

**REV. OFFICER/CARE MANAGER/BASE:** John Jones/Shieldfield Centre  
**careFirst ID:** 8700

**ANY CONCERNS, PLEASE CONTACT:** John Jones  
**TEL. NO:** 27000000

**STATUS OF CURRENT REVIEW:**  1. Formal Meeting  
2. Written  
3. Telephone

**Level of Need (FACS) from Care Plan**  
Critical or Substantial

**Objectives of Care Plan**

- To help you live independently at home
- To assist you to regain skills lost due to illness
- To provide support/relief to your carer
- To provide suitable care in a residential or nursing home

---

**CARE PLAN**

<table>
<thead>
<tr>
<th>PROBLEM / NEED</th>
<th>SERVICE PROVIDED / ACTION NEEDED</th>
<th>PROVIDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mental Health / Cognition</td>
<td>Tony requires monitoring of his mental health and liaison with his community RMO as necessary.</td>
<td>Ridgehill</td>
</tr>
<tr>
<td>Personal Hygiene</td>
<td>Tony can wash himself but need supervision in the bath. he will require monitoring to ensure he has met personal hygiene standards adequately. Tony should be given the opportunity to attend groups that allow him to learn about</td>
<td>Ridgehill</td>
</tr>
<tr>
<td>Sexual Needs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Person Centred Reviews in Adult Services
| Activities of Daily Living | Relationships, such as 'love life' at skills for people or alternatives as they arise. Tony requires prompting with dressing and washing. He requires supervision with eating as he can choke on certain foods. Staff need to administrate medications, provide support with Eddie organising his affairs and support with communication. Tony requires support navigating steps. Due to his immobility he will require assistance on transport such as the Care Bus. Tony requires full support with all domiciliary aspects of living - bathing, laundry, housework, shopping, using a telephone. |
| Advocacy | Rereferral can be made for advocacy as necessary. |
| Behaviour | Tony requires monitoring of his behaviours. There has been no risk related to absconsion and staffing will be adjusted to reflect this. |
| Communication | Tony requires issues to be repeated to him as he has some difficulty in retention of information. |
| Environment / Accommodation | Tony resides in ground floor accommodation adapted for his needs - The provider should liaise with RNE as managing agent of the property to resolve any issues. |
| Financial Matters | Tony requires full support with financial management. |
| Health Care Input | Tony has community nursing input which should continue till review. |
| Family / Social Relationships | Tony has a positive relationship with his sister and should be supported to maintain this contact. |
Education / Employment

The provider should actively work to update Tony's person centred plan and map activities that he is interested in regionally. Support should be provided for him to engage with these to build his confidence and make new friendships. As further opportunities are established, Tony needs support to engage with these at a pace appropriate for him taking into account mobility issues.

TEAM MANAGER: ____________________________ DATE: ____________

NEXT REVIEW TYPE: 1. Formal ☒ 2. Written ☐ 3. Telephone ☐

NEXT REVIEW DATE: 31 March 2008

Now enter into careFirst

PEOPLE PRESENT AT REVIEW

Alan Smith (manager), Tony Jones (support worker), Tony John Smith (service user), John Jones (social worker), Liz Hope (observer/scribe), Deb Gaunt (person centred reviews trainer).

DISTRIBUTION LIST

Tony Smith, Sue (sister)

COMMENTS OF USER

(If unable to give views, explain how views are represented at review)

Tony contributed to the review with a prepared list of things that are important to him now: to listen to his music, to buy CD's and DVD's, having the whole day on transport if he wants, to see his family all of the time, to see his friends often, going out for fish and chips to the quayside in North Shields and looking at Tynemouth Johnet, to be listened to always by his staff and be helped to achieve his aims, to buy new clothes, his stereo and photographs, trips away and meeting new people, socialising, keeping his flat neat and tidy, going out on the bus and metro (especially the open top bus), cigarettes, coffee, continuing with medication to stay healthy and focussed, having a full life, familiar staff and continuity of staff. Tony also said of what is important for the future: always looking for new and exciting ideas, having a full life and being listened to.

COMMENTS OF FAMILY / FRIEND / INFORMAL CARER / ADVOCATE

Sue was invited by letter – but possibly due to either missing post by the postal strike or work commitments she could not attend. Sue has requested she have copies of careplan / review documentation at the previous review.
COMMENTS OF PROVIDER
What we like and admire about Tony: Ability to adapt, sense of humour, ability to mix with people, very friendly/outgoing, very polite, very brave, very ‘snazzy’, very appreciative of what people do for him, his infectious smile, always up for new idea and likes new things to look forward to.

The provider identified with Tony that it was Important for the future that Tony maintains and develops friendships and stays in good health, that Tony may want to revisit the possibility of sharing a house with 2-3 other people, a holiday away and plenty of music opportunities.

RISK ASSESSMENTS
History of risk prior to admission: yes.

Pre-admission assessment accessible for review: YES ☑ NO ☐ Completed by:

Risk assessments on residential client file: yes.

What support Tony needs to stay healthy and safe: The provider identified - For Tony to go ahead with hip operation, to increase extra support, support and advice to give up smoking, increase of benefits (mobility), Tony said to help him meet his PCP aims. Social services identified: looking at changing bathing arrangements and looking at staffing and the safety of transfers from his wheelchair with the current support levels.

HAVE THE OBJECTIVES OF THE CARE PLAN BEEN MET: YES ☑ NO ☐

Please state reasons for your answer:

What is working:
Tony – always being allowed personal choice, feeling better, meeting new people, getting on well with staff being in his own house. Families views (given by the provider) – important to have familiar staff. Others views: independence and meeting people. What is not working: Social Services: bathing arrangements, loneliness in single person service, health limiting activities. Provider: wheelchair and lack of independence, some frustration, limited activities as a result of deterioration in mobility.

Questions to answer and issues to resolve:
If Tony were to move house, would he be able to keep the same staff?
To find out if Tony is happy to live on own at the moment (give him more time?)
Costing for a holiday
Wheelchair issues / transport to access activities.
Reassurance for hospital stay.

COMMENTS OF REVIEWING OFFICER/CARE MANAGER
The above issues were all discussed and an action plan was agreed. The action plan was distributed the same week as this part of the review took place. We discovered that Tony is now content again to live on his own and is at this time not interested in moving to shared accommodation. Priority issues were to refer for OT input regarding deterioration in mobility which was actioned immediately. The rest of the action plan is shown below:
### CARE PLAN REVIEW FORM

<table>
<thead>
<tr>
<th>What?</th>
<th>Who?</th>
<th>When?</th>
</tr>
</thead>
<tbody>
<tr>
<td>To arrange ward visit prior to hip operation – contact patient advisory/liaison service.</td>
<td>Mark</td>
<td>21st November</td>
</tr>
<tr>
<td>Letter to GP to advocate on Edwards behalf regarding his priority for a hip operation</td>
<td>Mark</td>
<td>21st November</td>
</tr>
<tr>
<td>Prepare hospital bag</td>
<td>Alan, Tony, Edward</td>
<td>By Xmas</td>
</tr>
<tr>
<td>Contact OT regarding mobility and bathing</td>
<td>Mark</td>
<td>7th November</td>
</tr>
<tr>
<td>Refer for advocacy (mobility, transport, future)</td>
<td>Mark</td>
<td>14th November</td>
</tr>
<tr>
<td>Benefits – chase up entitlement liaison with CAB.</td>
<td>Tony and Edward</td>
<td>End of November</td>
</tr>
<tr>
<td>Smoking Reduction Plan – and discussions with team</td>
<td>Edward and Alan</td>
<td>End of November</td>
</tr>
<tr>
<td>Staff induction plan</td>
<td>Alan Tony – discuss with team.</td>
<td>End of November</td>
</tr>
<tr>
<td>Holiday costing breakdown for social Services</td>
<td>Alan</td>
<td>9th November</td>
</tr>
<tr>
<td>Minutes of PCP review</td>
<td>Mark</td>
<td>16th November</td>
</tr>
</tbody>
</table>

Have the Service User’s financial circumstances changed since the last financial assessment? YES □ NO □

If Yes, a new financial assessment will be required.

Any changes to Care Plan as a result of Review YES □ NO □

Are the objectives of Care Plan being achieved? YES □ NO □

Are the dependency levels the same as at last review? YES □ NO □

Is it an interim placement? YES □ NO □

Date of admission: __ __ __ __ __ __

Preferred home? __ __ __ __ __ __

### REFERRED ON TO:

- National Care Standards Commission Date: __ __ __ __ __ __
- Contracts Unit Date: __ __ __ __ __ __
- Customer Service Duty Team Date: __ __ __ __ __ __

### Data Protection Act - Audit of Data Protection

This Authority is under a duty to protect the public funds it administers and to this end may use the information you have provided on this form within this Authority for the prevention and detection of fraud. It may also share this information with other bodies administering public funds solely for these purposes.
Appendix 4
The information gathered from a person centred review

My Person Centred Review

Introduction

A person centred review was held for Ross at The White Swan Centre in Killingworth on November 5th 2007.

Ross planned his review with support from Lindsey High. He invited the people who were important to him including his family and friends and in order for the statutory side of the review to be completed Ross invited his social worker.

The review helped Ross and all those involved to identify what was important to Ross now and in the future and what was working well and also the things that Ross would like to change and improve. The following information was gathered during the review and an action plan completed, in order to support Ross to achieve the things he identified throughout his review.
My relationship circle shows the people who are important to me and how often I see and talk with them. Some of the people in my circle are:

- My Family
- Friends (Fiona, Julie)
- Other people I know (neighbours, work, football)
- Paid support (G.P, Dentist, social worker)

People were asked to write down some of the things they like and admire about me. These are some of the comments they made.

- Considerate and Thoughtful
- A good friend
- Good sense of humour
- A proper gentleman
- Kind and Caring
- Hardworking
Other people at my review felt that were working and not working:

- Horseriding
- Buying the magazines for Weekdays
- Working on the stall at the Activity Centre

**What's working and not working, Other's view.**

**Action Plan**

The action plan is to help me and the people supporting me to work together to achieve the things that are important to me now and in the future:

- To travel on the train
- To set up a photograph album
- For Lindsey to visit mum and dad at home
- To travel independently
Appendix 5

Adult person centred review - commissioner perspective

I was recently invited to attend a review meeting for J. The review was based on a person centred review model, which means that the meeting was planned and held in such a way that J was comfortable and relaxed and got the most out of his meeting.

What are the things that made this a good meeting?

• J had clearly decided who he wanted at the meeting and where he wanted it. The meeting took place at his home and he had a mixture of support staff and friends at the meeting. He was surrounded by people who cared about him getting the support and life he wants. These people could help J deal sensitively with the questions that came up in the meeting.

• J had had time to prepare for his meeting. J had spent some time before the meeting thinking about different parts of his life. He had already thought about the things that he was pleased about and the things he needed support to change because they weren’t working for him. This means J got more from his meeting – his issues had a high priority.

• The way the meeting was held gave everyone a chance to get involved. J had a supporter at the meeting who made sure his issues went up on the flipchart papers to be discussed. Everyone had a chance to write things on the paper and there was help available from the facilitator for anyone who wasn’t sure about the questions or about writing things up.

• The headings on the flipcharts were all focused on J - not services. It made sure everyone stayed focused on J. Also, having an independent facilitator made sure we all stuck to the ground rules and stayed focused on J.

This meeting was very different to many traditional review meetings. It strikes me that what often happens at a review is:

• People are invited to a review meeting by a care manager or by paid support staff. The people invited are usually people who provide paid support to the person. This means the review concentrates mainly on service issues. Who invites you to a meeting gives a strong message about what the meeting is about.

• People aren’t supported to have time to think about what they want to discuss at the meeting. It can be hard to think about what you want to talk about at the review once everyone is there. What happens is that other people’s issues are discussed, mainly service issues. These service issues aren’t always the important things that the person themselves need to work through.
• People take it in turns to talk about how things are going for the person. The person can feel 'on the spot' having to talk in front of everyone about their life, making it hard to speak up and even harder to talk about any problems. Family members too are often intimidated to speak freely. This means meetings are less effective because they don’t address the important issues for the person themselves.

• Meetings can have a strong service focus. Usually the meeting is chaired by a care manager or a manager from a service. The person who chairs the meeting is very powerful - they decide what is discussed and shape how decisions are made. It can be easy for meetings to avoid the really difficult issues that the person themselves want to discuss and instead focus on what's important to services.

Traditional reviews are often not effective reviews because they are something that happens to a person, rather than something they are fully involved in. J's review supported him to be fully involved in reviewing how things are going for him while taking into account the views of everyone else at the review. Together we could problem solve how to move things forward. Not only this, but it took no longer than a traditional review - the meeting uses time efficiently by cutting out a lot of the talking people do and staying action focused.

GB Alternative Futures Group
Appendix 6

A personal perspective on person centred reviewing

I became a speech and language therapist because of a passion for communication and a healthy respect for the complex ways we all impart and receive information from one another. It’s an astonishing process fraught with difficulties and yet at the heart of everything we do. It’s extraordinary and fascinating before you even get into considering what happens when people have difficulties that affect the ways in which they communicate.

I found my niche in the speech and language therapist world and surprisingly it turned out to be working with people with no speech! A group of people often misunderstood and perceived to be not capable of communicating their needs. This is of course both ridiculous and disrespectful…but the myth continues.

I’ve watched appreciatively at the emergence in the work place of person ‘centredness’ and the range of person centred planning tools that are out there. It’s exciting for me as speech and language therapist because communication lies at the heart of all of it.

I have attended more person centred planning courses than I care to list and have learnt a great deal not just stuff to enhance the lives of the people I support but also stuff that has affected me both personally and professionally.

My first thought as I turned up for day 1 of the training…What could be different or further developed in ‘person centred reviewing’? Quite a lot as it turned out!

The most startling revelation was the statutory element to it. Seems silly now but as a health worker I hadn’t quite grasped that prior to day 1. That seemed to me to be a fantastic mutually beneficial merger. From a planning perspective it had teeth and from a statutory perspective it introduced breadth and depth and therefore the process becomes a more fulfilling experience for everyone. Again it seems obvious with hindsight that being person centred is a philosophy, an approach, a way of being; it isn’t a separate entity! It is easy at times to imagine a dichotomy with all things person centred on one side and statutory processes on the other. Mindsets and paperwork are the only obstacles to a sensible and potentially remarkable merger.

But how does a speech and language therapist find a role in facilitating a social services statutory requirement? Well there are 2 elements to the answer to that question. The first relates to integrated working practices and the second to speech and language therapist as a specific discipline.

I’m passionate about the concept of trans-disciplinary working practices which fits so neatly with person centred planning. Away from prescribed and exactly defined boundaries and separate spaces all skills in a team shared and utilized as appropriate with an understanding that key skills and knowledge will determine who contributes what for the best outcome.
for the people we are there to support. I certainly wouldn’t want in any way to detract from roles that are specific too and should be led by local authorities or certain disciplines but including a breadth of people in trainings specific to a reviewing process widens options and creates opportunities to ensure the process is a success. This is the case whether that person subsequently becomes a participant or a facilitator.

As a speech and language therapist it ticks all the boxes. Facilitation interests me professionally because the essential skills of a good facilitator are at the heart of working with people who are non-verbal. It’s fascinating to watch a facilitator work systematically through a process whilst watching the non-verbal behaviours of their group and responding as required. Not so different from the essentials required to work with individuals who are non-verbal. I really appreciate the emphasis on participation in the review being an opportunity to celebrate a person’s uniqueness. The idea that around an individual during their review should be those things that clearly represent them as an individual is inspirational. For someone with PMLD to participate in a review meaningfully requires creativity. That process is enriched by sharing stuff that they enjoy and allowing them to comfortably do what they want in their space throughout the review allows the person at the heart of the process to show other participants stuff about themselves. On my first review Jonathon had the dining table set up with a finger buffet (full of all his favourite foods!) and collections of lots of small things that he loves and I suspect make him feel safe and secure. A pile of stones, glass beads etc. He sat and ate and touched and held his favourite things. At the start Jeremy Clarkson and the rest of the Top Gear team joined us on the telly much to Jonathon’s delight. Non-verbal markers of who Jonathon is. As a speech and language therapist it was heartening to see such things acknowledged and respected as ways of someone contributing to their review. For people with SLD and particularly PMLD it would be very exciting to facilitate in the preparation stages an understanding in the wider participant group that they can share and evidence how packages of support are going through photographs and video footage etc and that these could be shared during the process. For others they may be able, with varying degrees of support, to produce information using whatever medium they wish to share meaningfully at their review. Clearly this isn’t new but combining it with a process that asks all the right questions but in a much more accessible and appreciative way that becomes formal because of its statutory element feels very new and interesting.

This is exciting stuff. It keeps the person with a learning disability at the heart of it all in a position to communicate something of who they are and what their experiences are like. It empowers the other participants with opportunities to express themselves that they may not be afforded or be able to take advantage of in a review that is based on verbal information only. It still meets statutory requirements.

Person Centred reviewing is in my opinion invaluable and moves us further into the realms of recognising that at the end of the day what we are trying to do whether through formal or informal means is ensure that the sharing and exploration of information, the act of communication is meaningful.

Esther Gibson
Specialist speech and language therapist
Appendix 7
Person centered reviewing - the facilitators nuts and bolts

The first review I was privileged enough to complete were of a brother and a sister, both of whom now live together, Arthur & Janet. Whilst there were fewer challenges in relation to their communication and capacity, there were many complexities and strands to the case that would suggest this was a good place to move things forwards in a direction it needed. “Now I feel like something is actually going to happen” as Janet said, when completed, and this I have now heard similar comments from two other colleagues as reported by the people they too have worked with.

The training was some way from the actual ‘live reviews’ so preparing for them needed a little thought, and remembering everything Charlotte had said, at the time so inspirationally, but now was diluted by the intervening stresses of daily work. Though what I also knew was that to immerse myself in the process would work for my assimilation of this process. So starting off with the arrangements I met with both Arthur and Janet. I had to do these separately and be careful of this, but as the arrangements would impact on each other they agreed a morning and afternoon would work for them.

Use the music in the background to create texture, a relaxing and comfortable place to be was what was suggested, well a good variety I have, and Arthur’s choice of Queen; excellent we had stacks to choose from (I had taken my iPod to check we could play it through their hi-fi). What I wasn’t prepared for was Janet’s ‘no music’. Ok Janet its your review (so pleased Janet’s would be second) at least my fear may be less visible with the deafening silence! Still Janet’s review: Janet’s choice!

Venue? Home definitely and unanimously. A compact and brand new flat, definitely didn’t have the room for flipchart boards, but did have an open plan kitchen so facilities good, I came up with the idea of not using the A2 sheets I had written by enlarging computer written headings (well they are saved now for less time taken up next time!) to A3; kind of shrink to fit the space. I even tested a small piece of blu-tack on the newly painted walls. No problems either who they wanted there and who I needed to have there to capture both sides of this review.

Don’t generally get too nervous, but then I can hide behind my developed and ‘safe’ social worker role, that was now stripped away and I was facilitator, Gill was my mentor/ assessor and general counsellor for the day being totally supportive and reassuring, we met early, went through everything, and reminded me of all the things I also should have (basics: blu-tack, pens, spares papers ‘oh and by the way have you done the ground rules?’ Ooops!)

Arriving at the flat, Arthur and Janet were expecting us, early to put up the papers, I didn’t have a routine so again my comfort zone was well…..not! But I’m there and Arthur and Janet were expecting their review, so couple of deep breaths, and get on with it set up and time to read through introductions and notes before the crowd arrived.
Gill had given me a couple of aide-memoirs and these were ideal. I don’t like reading from things and wouldn’t want a manual, and so just remembering the things to cover and in a rough order. People really also didn’t know what to expect so I could see we were all learning together. A simple ask ‘what do you like about Janet’ was easy for everyone to answer so the ball was rolling, they got the ideas that you write things down on the wall fabulous (but ditch the yellow pens!!!!!) so explanations of the headings now its your turn… that was funny as some other people were nervous now they didn’t expect this to happen, but some skillful modelling by Gill, coffee, cakes and shoving by me and they got the picture. Arthur’s advocate was great he spent some good paced time with Arthur discussing what Arthur wanted and then wrote them all down (such a neat writer!). The agency staff manager included got right in there writing everywhere too.

Drawing things to a close to this bit relied on knowing the right balance of time to give, as we still had to draw out the themes, I did use a larger piece of paper for the action plan, and started giving myself a look at what had written to draw together some ideas. I remembered Charlotte’s method of grouping and looking around the room magically was like dotted lines were circling all the five or six themes from each sheet… it really does work!

This was difficult bit for me as a social worker, this is also the bit where Gill kept reminding me to keep that hat off. Lisa was very skillful at treating the discussion to the social worker as a non present third party, that worked well and allowed us to work towards having an open discussion around the group trying to solve the problems, this included Janet and Arthur getting involved with things they could also contribute to, much less of a traditional ‘talked at by social worker as professional’ review and more of as a ‘group expert’ review; fantastic everyone took part and was part of these reviews and we got an action plan!

Arthur and Janet really enjoyed their quite different and separate reviews and were able to take part in each others. My feelings and emotions: scared, excited, nervous, lacking in confidence, surprised, relieved but really ‘buzzed’ on the outcome, satisfied in getting the paperwork completed by everyone else (photographs really helped!), and generally euphoric. These were the two most successful reviews I have ever completed, and now several months later they still have their effect; brilliant!

Paul Butler
Social worker
Appendix 8
Me, social work and person centred reviews

‘Twas indeed a fortuitous experience; two years training and a good ten years or so before that in support and care roles for people with learning difficulties and people with deteriorating neurological conditions. I have been a social worker for 4 years now, working with both Children and Adults, more recently back in a field that has changed relatively little across the several counties I have worked Learning Difficulties. I can love and hate my job and do; every day a diverse and challenging experience, and every day there are successes and failures both playing a heavy toll on my ability to respond with balanced emotions but respond indeed I do. Social Workers are trained to chair meetings, resolve conflict, promote change and place the service user at the centre of all this. We do this training by planning in groups, writing on flipcharts and spend a lot of that training standing up in-front of people presenting how; what a remarkable and amazing similarity to Person Centred Reviews!

I do reviews for a number of reasons: the government says I have to, my employer gives me timescales and because to inform good practice the service users and their carers need to have an opportunity to say whether or not things are working. I’ve done thousands of reviews in the traditional sense and range across two or three people to unwieldy numbers which when you are chairing and writing is cumbersome, isolated and now really focused on anything but filling in the review document (its blue here in Halton!), and ensuring its signed, authorized and feeds the huge computer database; the statutory requirements. Great I have no problem with this part of my role to ensure these are completed in a timely manner and do what they say on the top; review the care package, but stepping outside of the comfort zone is indeed a scary place…

My first time was completely different and like my first parachute jump I was thinking on air, it was happening and I couldn’t do a great deal about it except rely on my training, my skills, knowledge and values; great that’s exactly reminding me why I’m here. This can work or not, and I can facilitate that. Of course preparation goes a long way as does some rather supportive associates of Helen Sanderson! But primarily you get on with it, have a laugh, have fun, and get to the detail. I get to not worry about my handwriting, not have to fit all the detail into postage stamp boxes and not have to do all the writing.

And somehow it just happens it just really works, its like being on stage, but though some of the focus is on you as a facilitator, the buzz, the excitement I got was from having arranged it, people getting involved and watching people getting involved. Even as an experienced social worker I still in some reviews feel I question myself, they are long, laborious and boring, everyone doesn’t want to be there, many don’t turn up, and families don’t often feel reassured that this is not another paper exercise and that is the focus of the exercise to complete this form not Laura, or Sharon, or James or whoever it’s the Blue review document, Now people are scurrying around really thinking about the titles and what that means, there are no wrong answers, there is no judging here; its shared and its fun.
What a privilege to be allowed to be a part of someone’s creativity in their own home, watching their interactions, and those of other around them, being part of a review they have created. Well now it’s Laura making the tea comfortable because actually something might change, James with his advocates drawing in crayon on the what’s working document a picture of a tree of his favourite park, Sharon’s touching her favourite cushion because she really loves the music and people are around her who she recognizes are happy. Day service managers are writing on walls what they think are issues, and what they like about these people and care providers are there not just to get criticized for not having done something, they get the opportunity to say what they have done, and what important for them.

It’s exciting to think that technology has also had a good part to play in this, its photographed, attached to a DVD with their music, even MPEG’d and the service users don’t even have to sign it; they wrote it!! And you know best of all I actually get to wear a different hat, have a good time, and see what the social workers need to do and what they do well. Most of the time I love my work, and this reminds me exactly why: what a lucky place to be and probably is my comfort zone after all!

Paul Butler
Appendix 9
Questionnaire used for gathering information

How did your person centred review go?

1) Getting prepared (setting the scene)

<p>| A) What did you do to plan and prepare for your review? |
| B) What help did you need? |</p>
<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>C)</strong></td>
<td>Who helped you?</td>
</tr>
<tr>
<td><strong>D)</strong></td>
<td>Where did you meet?</td>
</tr>
<tr>
<td><strong>E)</strong></td>
<td>How did you feel about planning and preparing for the meeting?</td>
</tr>
<tr>
<td><strong>F)</strong></td>
<td>Who did you invite?</td>
</tr>
<tr>
<td><strong>G)</strong></td>
<td>Was this different from last years review?</td>
</tr>
<tr>
<td><strong>H)</strong></td>
<td>Did you find this better, worse or the same as last years review?</td>
</tr>
<tr>
<td><strong>I)</strong></td>
<td>Can you say some more about this?</td>
</tr>
</tbody>
</table>

### 2) Content

<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A)</strong></td>
<td>At the review meeting</td>
</tr>
<tr>
<td><strong>B)</strong></td>
<td>What happened? Who came?</td>
</tr>
<tr>
<td><strong>C)</strong></td>
<td>What help did you need to say what you wanted?</td>
</tr>
<tr>
<td><strong>D)</strong></td>
<td>Who helped you?</td>
</tr>
</tbody>
</table>
3) Closing the review

A) At the end of the meeting did you have an action plan?

B) Who is going to make sure that the actions happen?

C) How do you feel about the action plan?

D) Was the action plan different from last time?

E) Was the action plan better, worse or the same as last year's?

F) Can you say some more about this?
### 4) Thinking about the review

<p>| | |</p>
<table>
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<th></th>
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<tbody>
<tr>
<td>A)</td>
<td>What were you happy about?</td>
</tr>
<tr>
<td>B)</td>
<td>Did you find out something new?</td>
</tr>
<tr>
<td>D)</td>
<td>What were you worried about?</td>
</tr>
<tr>
<td>E)</td>
<td>Did you try anything new?</td>
</tr>
<tr>
<td>F)</td>
<td>Is there something you would like to happen now?</td>
</tr>
</tbody>
</table>

**Thanks a lot for your interest!**
Appendix 10

Letter asking people if they wanted to participate

Dear

Your Review - Can you help us make it better?

United Response wants to find out what you think about your review meeting.

To do this I will come and ask you some questions about your last review meeting.

You can be by yourself or bring a support worker or friend.

I will put all of the answers in a report for United Response.

You will get a copy of the report.

You will also get a £10 gift voucher as a thank you.
This will help us to make sure that the support people get at these meetings is the right support.

It will help us to make sure that you are listened to and supported to make the choices you want.

If you want to do this or you want to find out more,
please telephone me or email me or ask someone to do it on your behalf.

Belinda Heaney
Inclusion Co-ordinator North West.

Telephone
07970 579158

E-mail: Belinda.Heaney@unitedresponse.org.uk

Thanks a lot for your interest!