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# REPORT OF THE PERSON-DIRECTED PLANNING SYMPOSIUMS

**Ingersoll** – March 11, 2010

**Toronto** – March 23, 2010

**Ottawa** – March 26, 2010

**Thunder Bay** – March 29, 2010

**Sudbury** – March 31, 2010

Hosted by the

Community and Developmental Services Branch  
Ministry of Community and Social Services  
Province of Ontario

**Report prepared by Christine Peringer, Group Facilitation and Mediation Services  
Photos and artwork by Jack Pearpoint, Inclusion Press**



## **I. Introduction**

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### **Symposium purpose:**

In March 2010, the Ministry of Community and Social Services (the Ministry) hosted five one-day symposiums to promote a deepened and common understanding of person-directed planning across the province. The purpose of the symposiums was to:

- share information about the core values, principles and elements of person-directed planning;
- share stories of what is working well; and,
- share ideas about what supports people need to be able to share their gifts and to have a meaningful life in their community.

The symposiums took place during March 2010 in the following five locations:

- Ingersoll on March 11
- Toronto on March 23
- Ottawa on March 26
- Thunder Bay on March 29
- Sudbury on March 31

### **Steering Committee:**

A steering committee representing key stakeholders in person-directed planning provided advice to the Ministry in shaping the symposiums. The Ministry extends its sincere thanks to the members of the Symposium Steering Committee:

- Kory Earle, People First Ontario
- Yvonne Spicer, Council of Community Living Ontario
- Janice Strickland, Individualized Funding Coalition for Ontario (IFCO)
- Lynda Beedham, Faith Culture Inclusion Network
- Frances MacNeil, Community Living Toronto
- Cathy Stroud, Community Living Huntsville
- Laura Thies, Developmental Services Access Centre (DSAC) in Central West Region
- Linda Penner, Lutheran Community Care Access Centre in Thunder Bay
- Brian Tardiff, Citizen Advocacy Ottawa
- Marlyn Shervill, Windsor-Essex Brokerage for Personal Support
- Michelle Burd, MCSS, South West Region
- Jeannette Belanger, MCSS, North East Region



(from Left to Right) Lynda Beedham and Yvonne Spicer, two steering committee members, providing opening remarks at the Toronto symposium.



(from Right to Left) Brian Tardiff, steering committee member, providing opening remarks at the Ottawa symposium with Christine Peringer, symposium facilitator, and Christine Hughes, manager in the Ministry of Community and Social Services' Community and Developmental Services Branch.

## Symposium Agenda Overview:

The symposium agenda was designed to provide participants with information about person-directed planning from several knowledgeable speakers and then to provide an opportunity for participants to engage with the speakers and each other to share wisdom from the “rest of the room”.

The first part of the day included presentations from the Ministry, a keynote presentation on the essence of person-directed planning and a presentation on building capacity to provide independent or unencumbered planning<sup>1</sup> at the local level. Also in the first part of the day was a panel of individuals with developmental disabilities and their family members who shared their experiences of person-directed planning.

In the second part of the day, participants had two forums in which to express their views:

*Questions/Comments Board and Question and Answer Period:* In addition to asking questions after each presentation, participants were encouraged to write their questions and comments on post-it notes and post them on the “Questions/Comments” board. In the afternoon, the symposium had a Question and Answer period: the facilitator read the questions/comments from the post-it notes and the presenters responded. Participants had further opportunity to ask follow-up questions and provide comments from the floor.

*Café Conversations and Posters:* In the afternoon, participants engaged in three rounds of conversation, each with a new group, on two questions:

1. *What was a time when person-directed planning made a meaningful change in someone’s life?*
2. *What is one potential next step you are thinking about ... for yourself or the person/people you care about ... as a result of today?*

After discussing the first question with two new tables of people, the groups captured their key idea on posters that they then shared with the room. Participants then commented on what they saw and identified themes. Participants re-grouped a final time by geographic area and discussed their answers to the second question.

See page 6 for the Symposium Agenda.

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<sup>1</sup> “Independent or unencumbered planning” is defined as being undertaken by “an organization that is independent and separate from delivery of direct services, eligibility determination, funding allocation and determination of priority access performed by government offices or government-funded organizations”.

## Symposium Agenda

- 8:00 am**     *Registration and Breakfast*
- 8:45 am**     **Welcome and agenda review**
- 9:10 am**     **Ministry presentation** – Sheila Munk, Senior Policy Advisor
- Person-directed planning policy update
- 9:30 am**     **Keynote presentation** – Jack Pearpoint and Lynda Kahn, Co-leaders of Inclusion Press and Experts in Person-Directed Planning
- What’s at the Heart of Person-Directed Planning?
- 10:30 am**     *Wellness Break*
- 10:45 am**     **Our journey so far – Stories of person-directed planning**
- Personal accounts from adults with a developmental disability or families who have experienced person-directed planning
- 12:00 pm**     *Lunch*
- 1:00 pm**     **Modelling Community Change and Innovation – A community development approach** – Charlotte Dingwall and Cathy Stroud, representatives from Modelling Community Change and Innovation
- The experience of one “project community” building capacity to understand and support independent facilitation and planning at the local level
- 1:45 pm**     **Keynote reprise** – Jack Pearpoint and Lynda Kahn
- Collaboration and Partnership - Learning to listen
- 2:00 pm**     **Question and answer period**
- A panel of symposium speakers responding to participant questions
- 2:30 pm**     *Wellness Break*
- 2:45 pm**     **Café conversations**
- Sharing our own stories of meaningful person-directed planning
  - Patterns and themes in our stories
  - Sharing potential next steps
- 4:15 pm**     **Closing remarks**
- 4:30 pm**     *Adjournment*

## Symposium Participants:

The Ministry opened attendance to the symposiums to the four key groups of people interested in person-directed planning:

- Adults with developmental disabilities;
- Family members of people with developmental disabilities;
- Organizations who provide services to people with developmental disabilities, including planning; and,
- Ministry staff and other parties interested in person-directed planning.

More than 450 people in total attended the five symposiums. There was a strong representation from each of the groups. The following table provides a breakdown of who attended each symposium:

| <b>Groups:</b>  | <b>Ingersoll</b> | <b>Toronto</b> | <b>Ottawa</b> | <b>Thunder Bay</b> | <b>Sudbury</b> | <b>Total</b> |
|---|------------------|----------------|---------------|--------------------|----------------|--------------|
| Adults with developmental disability                                | 18               | 12             | 14            | 9                  | 12             | <b>65</b>    |
| Family Member   | 25               | 30             | 32            | 14                 | 12             | <b>113</b>   |
| Service Provider  | 31               | 30             | 29            | 34                 | 45             | <b>169</b>   |
| Other (e.g. MCSS staff, other Ontario government staff, volunteers) | 22               | 30             | 23            | 13                 | 21             | <b>109</b>   |
| <b>Total Participants</b>   | <b>96</b>        | <b>102</b>     | <b>98</b>     | <b>70</b>          | <b>90</b>      | <b>456</b>   |

## The Person-Directed Planning Symposiums Logos:

Two logos were developed for the person-directed planning symposiums (see below).

The trillium flower represents Ontario and the goal of the events: to promote a common understanding about person-directed planning across the province.

The circular image represents a person (symbolized by a star) with unfolding, emergent gifts and contributions (symbolized by the unfolding spiral), surrounded by a circle of support in an ever-expanding web of connections and community.

The symbol inside the star imagery can also be imagined as a Koru, a Maori image for new growth, new beginnings, emergence - a foundation for social inclusion, which is at the centre of both person-directed planning and the broader transformation of Ontario's developmental services.



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## II. Presentations

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### Ministry Presentation: “Person-Directed Planning Policy Update”

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A summary of the presentation by  
**Sheila Munk, Senior Policy Advisor**  
Community and Developmental Services Branch, Social Policy Development Division  
Ministry of Community and Social Services

Person-directed planning is a new category of services and supports under the new developmental services legislation, the *Services and Supports to Promote the Social Inclusion of Persons with Developmental Disabilities Act, 2008*. Under the new law, people and their families will be given a choice about whether they want person-directed planning and where they can go for help to develop their plans.

Person-directed planning is defined in the new law as:

*“Services and supports to assist persons with a developmental disability in identifying their life vision and goals and finding and using services and supports to meet their identified goals with the help of their families and or significant others of their choice.”*

In plain language, person-directed planning is defined as:

*Services and supports to help adults with a developmental disability:*

- *Identify their life dreams and goals*
- *Find and use services and supports in their lives to make their plan happen.*

The concept of person-directed planning is not new -- it has been evolving for more than 30 years in Ontario and around the world under different titles including "person-centred planning". The Ministry shared some of its research findings and outlined its anticipated next steps regarding person-directed planning.

The Ministry has conducted a literature review, consultations, a survey and a demonstration project on person-directed planning. (Research results are available on request.) This research yielded a wealth of information – here follow some highlights.

The review identified the following common features of person-directed planning:

- Values: It is based on self-determination, choice, inclusion and citizenship.
- Visioning: The individual and significant others describe their vision for the future.
- Strength-based approaches: It builds on the strengths and abilities of individuals.
- Being person driven: The individual drives the planning process.
- Network development: It builds a relationship network to support the individual.
- The use of non-paid and generic supports: It reaches beyond paid supports to realize planning goals.
- Community capacity building: It usually requires developing relationships with community groups to increase opportunities for community participation.

While definitions and approaches to person-directed planning vary, there is wide agreement about its importance. There is also widespread desire to improve the quality and availability of planning. Further, Ministry research found that most people experience positive outcomes from person-directed planning especially when:

- They can build a trusting relationship with an experienced facilitator;
- Planning is seen as an on-going process;
- Safeguards are put in place to address the perceived and/or potential conflict of interest when planning facilitation comes from an agency that provides direct service; and,
- Strong community partnerships are built.

The Ministry will next be consulting with key informants and an expert panel as it moves to creating policy guidelines about person-directed planning.



Sheila Munk, Senior Policy Advisor, providing a policy update about the ministry's person-directed planning work to date and next steps in Ingersoll.

## Keynote Address: “The Heart of Person-Directed Planning”

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Summary of the keynote address by  
**Jack Pearpoint and Lynda Kahn,**  
Co-leaders, Inclusion Press, Toronto and  
Facilitators, trainers and writers in the field of person-directed planning.

### **Inclusion: The change we all need**

Jack and Lynda shared their premise that everybody has a place, and a gift and contribution to offer, without exception. “Inclusive” is about everyone, not just those who have been excluded. But, to discover these gifts and capacities, the keynote speakers said we need to learn to slow down (individually and as a society) and listen to each other. They pointed out that remarkably, master tutors in listening are all around us, ready and willing to help. They are people who have not had a valued role - to date. They said that now is the time for all of us to engage in community renewal by slowing down to listen and by welcoming the gifts of people who will ‘teach us’ to slow down and just listen. They identified this as an opportunity to welcome unopened gifts of capacity.

The keynote speakers listed these core values for person-directed planning (and a good life for all of us):

- Belonging** -- friendship, membership, participation
- Contributing** -- supporting others in developing capacities
- Being respected** -- encouraging valued roles
- Community presence** -- sharing gifts in ordinary places
- Choice** -- autonomy in life in small and big ways

Implementing these values will require an attitude shift in all of us. They said that society has made significant progress in the last 100 years in how we treat people with developmental disabilities. However, some programs and policies still operate from many old beliefs. They explained that these beliefs will have to evolve into genuine welcome to make our ways of interacting truly *person-directed*.

The speakers challenged themselves and participants to ask:

*“How can we make relationships and build organizations based on the realization that there is no one whose contribution we do not need?”*

*“How can this person show up in community life as a valued friend and a contributing citizen?”*

## Connecting individual gifts with community needs

Jack pointed out that a person is like an iceberg -- only 10% is easily visible. A planner's job is to make the other 90% of gifts and capacities visible. To do this requires practice: listening deeply for capacity, holding unanswerable questions and committing to clear agreements – thus inviting the 90% of us that is hidden, to emerge.

Lynda said that having listened for gifts and capacities, the next step in person-directed planning is to discover places that need and welcome those gifts and capacities -- then make a connection. Supports will have to be adjusted, learning will require constant review and revision, as a person's life keeps evolving. Thus, planning is more than just a meeting. It takes time, and happens over time and repeatedly. She noted that for any of this to happen, facilitators and supporters must strongly believe in the person, or they will never discover or nurture capacity and connection.

The keynote speakers explained that no one is independent -- we are all interdependent. Thus all of us, from time to time will utilize support. There is the 'natural support' with family and friends – but for many people, a bit more is needed. Jack explained how organized supports make things possible, if the organization is listening and responsive. But the weakest leg in this three-legged stool of supports is this connection with the community. The three together provide balance. Jack pointed out that without the community leg of the stool, we can become fearful as people, consider ourselves dominated by organized supports and find ourselves isolated.

Lynda described how, for many, the community circle may be under-populated. She quoted Judith Snow, who said,

*“Our biggest disability is loneliness – people may be mildly lonely, moderately lonely, severely lonely or profoundly lonely.”*

Thus, the work of person-directed planning is to listen for gifts and capacities and then to weave connections into the community – the most undernourished piece of our work. To start, Lynda advised listening for gifts, interests and capacities and then to seek associations, groups, people who share those passions *in* the community. It could be quilting, making model airplanes, reading, or computer games -- there is a group for just about every interest a person might have. Identify a place in the community where someone's capacity is welcome; make the connection and adjust supports as needed. If it feels too hard to ask for yourself or for someone in your family, ask someone else to make the first connection on your behalf.

## Patience in moving people and systems to greater inclusion

Jack described how there is a predictable pattern when something new is discovered: the peak of inflated expectation followed by a trough of disillusionment when things do not play out as hoped. This was his experience when, 30 years ago, he with others first created PATH and MAPS. They thought their new approaches would help to close institutions and give people real lives in the community. He said that through this experience he learned patience and humility and that a cultural shift of this magnitude takes time. Changing societal beliefs about people's capacities takes more than a tool – even if they are useful on the journey.

Jack and Lynda described how on this journey to freedom, person-directed planning values like citizenship, inclusion and self-determination, even when espoused by organizations, can be turned into systemic requirements. With the best of intentions, systems can 'industrialize' concepts like natural supports and person-directed planning and lose the values.

The keynote speakers concluded by saying that if we listen deeply for gifts, focus on core values, and begin conversations with an expectation of hospitality, capacity and generosity, that is what we will find. They encouraged participants that as we approach this future, resplendent with unrealized opportunities for people who have been ignored and underappreciated, we need to respect our doubts and fears, while thinking and acting from hope and courage.



(from Left to Right) Jack Pearpoint and Lynda Kahn, symposium keynote speakers, presenting about what is at the heart of person-directed planning in Sudbury.

## Modeling Community Change and Innovation (MCCI) Project

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**Charlotte Dingwall**, Modeling Community Change and Innovation, project lead  
**Cathy Stroud**, Executive Director of Community Living Huntsville and  
MCCI provincial steering group member  
[www.modelingcommunitychange.com](http://www.modelingcommunitychange.com)

Modeling Community Change Innovation (MCCI) is a provincial project funded by the Ontario Trillium Foundation (2007 – 2010). The project has six partners:

- Windsor Essex Brokerage for Personal Supports (lead);
- Brockville and District Association for Community Involvement;
- Community Living Huntsville;
- Community Living Windsor;
- Ontario Federation for Cerebral Palsy; and,
- Individualized Funding Coalition for Ontario.

There are three project sites -- Windsor Essex, Brockville and area, and Huntsville and area. The project is rooted in the work of the Individualized Funding Coalition for Ontario ([www.individualizedfunding.ca](http://www.individualizedfunding.ca)).

The Modeling Community Change and Innovation project's purpose is to increase understanding and capacity for independent facilitation and planning. By "independent", the project is describing facilitation and planning that is separate from direct service agencies and from funding allocations, and based on the values of citizenship. MCCI believes that all people want to have a good life: they want to have choice and control in their lives, and as citizens to belong, contribute and participate in families, neighbourhoods and groups.

With this in mind, the project goals are:

- to increase community capacity for facilitation and planning;
- to educate, provide information, develop and share resources;
- to seed and strengthen autonomous groups for education, support and information exchange (e.g. Family Networks, People First); and,
- to provide an opportunity for an Ontario Independent Facilitation Network to flourish in order to support independent facilitation and planning both locally and provincially.

In 2010, the project will continue with a focus on documenting and sharing the project information, experience and learning.

## Report from Huntsville and area

In Muskoka, Parry Sound and Nipissing, the project has increased understanding of individualized funding and independent planning by sharing information with families, disability leaders, the board of education, chambers of commerce and others. The project held conversations and training about support circles, facilitation leadership and planning, and autonomous groups.

The strengths and activities of the broader geographical area contribute to the project's information and learning. These include the provincial person-directed planning demonstration project, experience with person-centred approaches, and family engagement.

This project community has worked to seed and strengthen autonomous groups, including the creation of People for Inclusive Communities. (For more information, see [www.peopleforinclusivecommunities.com](http://www.peopleforinclusivecommunities.com)). In the project region, an Independent Facilitation and Planning Steering Group made up of people with disabilities, family, service providers, potential facilitators, the Modeling Community Change and Innovation project, and the Ministry of Community and Social Services has formed.

From this strong foundation, the project is committed to developing and launching independent facilitation and planning as an option in this area.



(from Left to Right) Cathy Stroud and Charlotte Dingwall  
presenting about the Modeling Community Change and Innovation Project in Ingersoll.

### **III. Our Journey so far: Stories of Person-Directed Planning**

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At each symposium, a panel of adults with developmental disabilities and family members from each region shared their stories of how person-directed planning helped them plan for their lives now and in the future. Each presenter, usually with a supporter, shared his or her planning story. The presentations were rich in information and advice.

#### **Ingersoll Symposium Panelists:**

- Jerry Kluytmans with his mother Connie Kluytmans;
- Adam Viger with Paula Orth, Community Living London; and,
- Brian McKnight with Lisa Tennant, Family Services Thames Valley and Susanna Joyce, who facilitated the planning process.

#### **Toronto Symposium Panelists:**

- Mark Miller with Ann-Marie Binetti, Community Living Toronto, who facilitated the planning process;
- Julia Niimi with Judith McGill, Families for a Secure Future, who facilitated the planning process; and,
- Stephanie Prysruk with her mother, Barb Prysruk.

#### **Ottawa Symposium Panelists:**

- Deborah Vigier, mother of Jesse (not present) with Andrea Podruski, Citizen Advocacy of Ottawa, who facilitated the planning process, and Gabe Reynolds, support worker;
- Joe Donegan with John Comfort, L'Arche Ottawa, who facilitated the planning process;
- Sally LaRochelle, mother of Sonja (not present) with Joyce Lundrigan, Citizen Advocacy of Ottawa who facilitated the planning process; and,
- Kirby Adam with his mother Noreene Adam, and Tina Williams, Community Living Upper Ottawa Valley, who facilitated the planning process.

#### **Thunder Bay Symposium Panelists:**

- Daniel Finlayson supported in telling his story by Charlene Lopenon, Lutheran Community Care Centre, who facilitated the planning process;
- Paola Facca from Lutheran Community Care Centre sharing the story of Lynn Chapais, who was not able to attend;
- Todd Simon with Rob Todd, Community Living Thunder Bay, who facilitated the planning process; and,
- Jean-Paul Imbeault with Sherri Little, Community Living Thunder Bay, who facilitated the planning process.

**Sudbury Symposium Panelists:**

- Julia Niimi with Judith McGill, Families for a Secure Future, who facilitated the planning process;
- Karla Struyk with her mother Cathy Foyston; and,
- Roger Tremblay with Tammy Rheame-Fortin, Community Living West Nipissing, who facilitated the planning process.

(from Right to Left)  
Mark Miller, telling his story with some help from Ann-Marie Binetti, while the rest of the Toronto panel looks on.



Christine Peringer (middle), symposium facilitator, introducing the panelists in Sudbury.

Panelists at each symposium shared stories about their experiences with person-directed planning. These stories were told by the individuals who had received planning, their family members and service providers who had helped to facilitate the planning process.

Like the planning process itself, each story was unique to the person telling it - their gifts, dreams and life goals. All stories provided examples of how, with the help of person-directed planning, adults with developmental disabilities can contribute and have meaningful lives in the community.

Challenges associated with person-directed planning were shared, such as when planning is undertaken with individuals who have little natural supports or with individuals who have limited verbal communication skills. Despite these challenges, however, stories shared underscored the fact that person-directed planning can be undertaken with anyone – the process itself can be tailored to the individual and their unique needs.

The importance of the relationships between the individual, their family or other loved ones, and the person facilitating the planning process was emphasized as central to successful planning. Individuals needed to feel that they could trust and rely on the others involved in their planning. The idea of planning being an ongoing process and being helpful at different point in a person's life, such as in times of transition, was also shared. Some examples of transition included entering the adult system from school or child welfare systems.

Overall, symposium participants heard about the many successes achieved by individuals who have undertaken person-directed planning. These ranged from stories of individuals moving from group homes to independent living, to individuals who felt that, through the planning process, the people in their lives were starting to really listen and support them based on their wants and desires. All stories highlighted how person-directed planning has increased the quality of life for adults with a developmental disability and their inclusion in communities across Ontario.

Other themes in the stories shared by panelists about person-directed planning included:

- Empowerment: Panelists shared their experience of how planning reduced their fears about the future, helped them see beyond their disability label, increased their belief in themselves and allowed them to focus on the positive things they wanted in their lives.
- Self-determination: Panelists spoke about the positive impact of people really listening to them, the way dreams can be achieved over time and the importance of looking beyond labels and history to see the person's aspirations and capacities and how these allow for meaningful community contribution.

- Planning is person-directed: Panelists shared stories about how each planning experience will unfold differently because a different individual is directing each process. The panelists shared information about how they organized events to create their plans. They provided details on how they made decisions about where the meeting would take place and who would attend.
- Planning is incremental: Panelists spoke about how planning can help a person deal with both big fears and big dreams. They talked about how planning was scary for themselves and their loved ones because of the many changes that it could bring about. They also talked about how planning helped them break down potentially daunting goals into smaller, do-able actions.

After each panellist spoke, participants were given the opportunity to identify the individual's gifts that they had gleaned from the story shared. Examples of gifts included "leader", "teacher", "courageous", "advocate", and "loving". These gifts were then made into a poster that was given to the panellist as a thank you for sharing their planning process.



← Poster for Brian McKnight, Ingersoll panelist.



Poster for Joe Donegan, Ottawa panelist. →



← (from Right to Left) Julia Niimi, Toronto and Sudbury panelist, with her poster and Judith McGill.



Poster for Jean-Paul Imbeault, Thunder Bay panelist. →

The following are quotes from symposium panelists about their experiences with person-directed planning:

“Two years ago, I didn’t want to discuss independence because it was too scary. When I met Marlyn [a planner with the Windsor Essex Brokerage for Personal Supports], we had many meetings, talking about moving out. One day I would be very anxious ... and would make myself feel sick with worry. Marlyn had a lot of patience in helping me not to be scared of the future. She made me understand that I wouldn’t be alone. That I was in charge of my future and I was the one making the decisions. So now, I’m not so scared but I feel happy and excited to be on my own. Someday I will enjoy my very own super deluxe apartment!” ~ Jerry Kluytmans, Ingersoll panelist

“My support circle has been together now for almost three years. ... Judith or facilitator Joanna Goode met with me to decide what we should talk about at the circle. I write ideas down for the agenda before they get to my house ... Decision-making can be a handful, more than you think. A lot of ideas pop up and it can be a handful to process. When people disagree, I tell them why I need it talked about in a positive way so they understand my approach and my vision. When they hear from me they say, ‘Oh *that* is why you are saying that.’” ~ Julia Niimi, Toronto and Sudbury panelist

“In 2005, I did a PATH with goals and dreams. In 2008, my dream came true when I got my own apartment. I had a lot to prepare - like learning to clean, budgeting (which is an ongoing process), and cooking. I worked with someone for a year learning to cook. I learned to cook casseroles. I got a slow cooker and that helps a lot.” ~ Joe Donegan, Ottawa panelist

“I went from living in foster care since I was 14 – because of my anger problems my family couldn’t keep me at home – to dropping out of high school to going back and graduating from high school and now taking college courses. I am spending a lot of time with my family and we have a good relationship now. They have come over to my place for dinner. I have many new friends and we like to go camping, biking and hang out. I go to the gym on my own and with my workers. I have gone down two pant sizes. I don’t use (recreational) drugs any longer. I volunteer at various places in the city ... I run my own snow-shoveling and yard-raking business. I feel that I am where I am today because I have faith in myself to make and reach my own goals and because of the supports I have around me to help me with planning and reaching my goals.” ~ Daniel Finlayson, Thunder Bay panelist

“I went from living in a group home to living with my mom. Person-direct planning matters because I had goals and didn’t know where to start. Then Tammy got me going and reading up on stuff. I wanted my driver’s license but I didn’t know if I could start or find the money. Planning helped me learn who to talk to and where to start.” ~ Roger Tremblay, Sudbury panelist

## IV. Symposium Themes

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After the above presentations, the symposium focus moved to the participants. Methods of interaction included a question and answer period and a conversation café (three rounds of small group discussions each with a different group of people). The café included the creation and sharing of posters summarizing key elements of person-directed planning. There were also times of full group discussion in which people reflected on what they were learning. At the end of the day, participants completed feedback forms evaluating the symposium and sharing their learnings and next steps.

Here follows a summary of the nine common themes that emerged from these multiple sources of participant input. There was consistency throughout the province regarding the learnings and concerns participants shared; the following list represents the themes from all five symposiums.

The themes are of two types: those related to excellence in person-directed planning and those related to access to person-directed planning and its availability as a choice throughout the province. The themes are numbered here for ease of reference, not priority.

### Excellence in Person-Directed Planning

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**1. Person-directed planning empowers people by focusing on strengths, capacities and possibilities.**

The theme of empowerment rang through all the symposiums as people shared their experiences of looking past disability labels to focus on a person's strengths. They shared the importance of an optimistic, "can-do" attitude in planning. While some concerns were raised that it was unfair to individuals when the dream might not be realized, many participants expressed belief in the importance of hearing people's full dreams.

**2. Deep listening is required to support someone to identify his/her dreams.**

The importance of absolute attention to what a person is communicating, in whatever way they communicate, was a common theme, especially in the conversation cafés. Many participants shared their intent to practice this kind of listening. People intended to encourage others to dream fully and then strategize about the small steps that the person can take toward their dreams.

**3. Community connection is required to link a person's gifts and potential contribution with a place in which those gifts can be valued.**

This was a consistently reported upon area of learning for participants: the more connections you can access, the more likely a place will be found in which a person's gifts will make a valuable contribution. A Circle of Support <sup>2</sup> is a prime tool in this process because members of a circle will have many more community connections than an individual, family member or support worker will have alone.

**4. Each plan and planning process will be ongoing and unique when doing person-directed planning.**

The concept that planning is not a one-time event, but rather is a process of evolution over time had resonance for the participants. Because each individual has his/her own hopes, dreams, gifts, and preferences for how the planning process takes place, each planning experience will be different. Many participants left the symposium with plans to have individuals at the centre of the process directing all aspects of how they want to have their planning conversations.

**Access to person-directed planning**

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**5. People want to learn more about person-directed planning in order to make an informed choice.**

People and communities have varying degrees of awareness about person-directed planning. At each symposium, some participants were introduced to person-directed planning for the first time; for others, they had been using this approach for many years and the symposium affirmed what they already knew. In between these extremes were participants who deepened their understanding and learned new aspects of this planning approach. Many participants shared "learning more" as their next step. Many requested follow-up events: for example, some suggested symposiums be held again once guidelines for person-directed planning are created.

**6. Many people find it difficult to access person-directed planning.**

While some participants said that this approach was not for them or their loved one, most participants were eager to get planning support and experience the benefits of this approach. While some people have managed to get these services and in some pockets of the province there is a network of support,

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<sup>2</sup> A "Circle of Support" is defined as "a group or network of trusted people that support an individual in doing things, like making decisions".

person-directed planning is not available to the majority of people. Participants want the choice to be available for all.

**7. Independent or unencumbered planning is a preferred option for many.**

Many participants said they are looking for plans to be facilitated by an independent/unencumbered planner -- a person who provides only planning and facilitation supports and who is separate from the delivery of direct service. Some expressed hope that the regional initiatives for independent/unencumbered planning would spread across the province. Many requested that ongoing infrastructure funding be given to independent/unencumbered planning and facilitation organizations to make this a real and sustainable option for people.

**8. Work is required to explore best practices for service agencies to provide person-directed planning to people who receive residential or day supports.**

There are some challenges for service providers in offering people help to develop their person-directed plans. These include the risk and/or perceived risk of conflict of interest -- not being able to fully hear a person's dreams when the dreams have implications for how a service provider's programs are delivered. Customized processes, plans and implementation may run counter to common organizational values such as efficiency. Many participants from agencies are looking for ways to overcome these challenges and are taking the messages of the symposiums back to their organizations. They are eager to know how, and to what extent, their agencies can offer person-directed planning.

**9. The Ministry needs to establish a policy framework and funding allocation process to build access to person-directed planning province-wide.**

Stakeholders are looking for an implementation framework that will make planning and facilitation resources available. Such supports include qualified, experienced facilitators and a way for individuals, families and service providers to access their services. Currently, there are not enough planners and person-directed planning is not yet a funded category of support. Participants cautioned that accountability measures need to recognize person-directed planning as a life-long and highly individualized process of evolution and not a one-time or even annual event. One recommended next step is to establish an advisory group to oversee the person-directed planning process province-wide.

## V. Concluding Remarks

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The symposiums provided an opportunity to share information on person-directed planning and build a common understanding of this newly legislated category of support.

There is strong interest in person-directed planning among all stakeholders – adults with developmental disabilities, their families, service providers, the Ministry and others throughout the province. Most participants believe that person-directed planning is a very valuable approach and are eager to know how to access it.

The values underlying person-directed planning -- self-determination, choice, inclusion and citizenship -- echoed through all the symposiums in both the words of the speakers and those of the symposium participants.

There is a strong interest in moving forward: people want to make this new category of support a reality for all who want it. People want the Ministry to create a process and provide funding to make it happen. Service providers are examining how they can offer such planning in a way true to person-directed planning values. There is a request by some for government support of independent/unencumbered planning.

Person-directed planning has a 30-year history and there is much hope now that it has been recognized in the law as a new category of support. The Ministry guidelines are eagerly anticipated, as people want the implementation of person-directed planning to be part of Ontario's transformed developmental services system.

These symposiums mark a significant step toward that new reality.



Themes about person-directed planning from the Ottawa symposium, represented in a summary poster.