

# **Trainee Handouts for Module Two**

**1. Any state promotional material (states will provide)**

**2. Schedule of Events and Learning Tasks**

**3. Power Point Slides (six to a sheet)**

**4. Risk Tolerance Quiz**

**5. Scoring sheet for Risk Tolerance Quiz**

**6. Case Studies (with decisions)**

**7. Format Evaluation**

**8. Content Evaluation**

# MODULE TWO: The Dynamics of Choice and Decision-Making for Participants

## Schedule of Events

### 8:30–8:45 ..... I. Introduction to Learning Tasks for Module Two

**Learning Task One:** Integrate the cognitive, emotional, social and purpose-driven components of choice and decision-making.

**Learning Task Two:** Reflect on the ethical and practice dilemmas that arise in participant-directed care when the “right to choose” may conflict with the “right choice.”

**Learning Task Three:** Develop skills in facilitating the choice and decision-making process for participants in the consultant’s/support broker’s role as coach and teacher.

### 8:45–9:30 ..... II. Processing of Special Chairs Exercise

### 9:30–10:15 ..... III. Identifying Consultant and Participant Tolerance for Risk

**Group Exercise One:** Administration of Risk Tolerance Quiz for consultants.

### 10:15–10:45 ..... Break

### 10:45–11:15 ..... IV. Facilitating the Decision-Making Process for Participants

What Influences Decisions and How to Achieve Balance.

**Group Exercise Two:** Case Examples with decisions. Relate decisions to body parts associated with participant decisions and self-awareness of risk tolerance issues for consultant.

### 11:15–11:45 ..... V. Techniques to Help Participants Expand Decision-Making Choices

Relationship Building Techniques ( Personal Stories, and Bulls-Eye Diagram)  
Expanding Participant Choices (Brainstorming, Parallel Scripting, Pros/Cons and Best/Worst List.)

### 11:45–12:00 ..... VI. Evaluations Parts One and Two





## Review of Tenets of Participant-Directed Care

- May represent a wide range of choices from a single service to total life planning options.
- Places the participant as expert in identifying needs and desires.

## Participant-Directed care...

- Consultant's role is that of facilitator, coach, and teacher not expert.
- Participant-directed care focuses on choice and active decision-making

## How did you decide where to sit?

<i>Special Chair</i>	<i>Motivating Factors</i>
Chairs with Nails	Logical factors, experience, nails will be uncomfortable or dangerous.
Chair in front of room	Emotional factors, high profile seat, attracts special attention.
"Reserved Sign"	Social factors, consideration and respect for others, goes against norms.
Chair facing backwards	Overall purpose of attending training, can't see or hear.

## How do you decide where to sit?

<i>Special Chair</i>	<i>Motivating Factor</i>	<i>Body part analogy</i>
Chair with Nails	Logical factors and experience	Head
Chair in front of the room	Emotional factors; high profile seat, attracts special attention.	Heart
"Reserved Sign"	Social factors, consideration/respect for others	Hands
Chair facing backwards	Overall purpose of training, can't see or hear in that chair.	Purpose-driven

## Intellectual Factors (Head) in Decision-Making

- What "knowledge" (or lack of) do participants bring to making decisions about services?
- What kinds of gaps in knowledge may affect the kinds of decisions participants will make?
- How do we "educate" participants without violating their right to self-determination?

## Emotional (Heart) Factors in Decision Making

- How do past emotional experiences affect the decisions a participant makes?
- What kinds of things do participants have strong emotional reactions to? Fear? Joy? Anxiety? Anger?
- How do emotional factors cloud the role of knowledge in decision-making?

## Social (Hands) Factors in Decision-Making

- What social experiences (or wanting social experiences) will affect who participants want to interact with them?
- How do you think the participant sees himself or herself in relationship to greater society? How does this affect decision-making?

## Purpose-Driven Factors in Decision-Making

- Do you think your participants have a "vision" for their lives? Why? Why not?
- Do they have dreams of what they want in life?
- Do they see a reason for their lives?

## Risk is...

- The likelihood of a bad or undesirable outcome.
- The willingness to tolerate uncertain outcomes.

## What is your risk tolerance?

- |   |   |
|---|---|
| • Risk averse:  | • Risk seeker:  |
| Prefers structure, certainty, with less (rather than more) variability. | Prefer ambiguity, greater tolerance for unknown consequences. |
| Worst case scenario   | Best case scenario  |

## Risk tolerance is a function of ....

- Personality structure
- The biological need for thrill
- Age and gender
- Birth order
- Level of education
- Previous experience
- Perception of irreversibility

## Risk with dignity:

- Exploration of options
- Careful consideration
- Honoring of choice

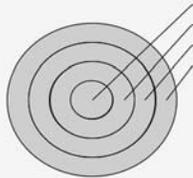
- What components are influencing decisions?
- What risks exist? Who is risk averse?
- Can you broaden choices to be considered?

### Personal Stories:

- Helps participant talk about his/her life
- The story will help identify needs and wants.
- Stories will explore previous decision-making
- Themes emerge.

### Bulls-Eye Diagram

- Who are first circle friends?
- Next circle of friends or family?
- Those you know but are not close to.
- How often do you see these people?



### Brainstorming:

- Maximize the number of ideas generated to solve a problem within a short period of time.
- Get creative juices flowing.
- Revisit all ideas for most practical.

### Parallel Scripting:

- Tell the participant a story of someone in a position similar to his or hers.
- Through the story, options can be offered to help participant explore what s/he can do to meet service needs.

### Make a list!!!

- Pros/Cons List
- Best/Worst Case Scenario

## Risk-taking is part of participant choice...

- Risk taking is often due to over-reliance on one aspect of decision-making. Often more heart than head.
- Few decisions are irreversible and are always a learning experience.
- The "illusion" of choice is more degrading than the lack of it. Participant choice means participant choice.



## Risk Tolerance Quiz

**Situation One:** You inherit a large sum of money and your financial advisor suggests two types of investments. In the first investment, you invest a moderate, set amount, and receive a modest guaranteed payoff at the end of the investment. The second choice includes a much larger investment (most of your inheritance) but also has a larger potential payout—it also includes the possibility of losing all your money in an economic downturn.

1. Which type of investment would you choose?
  - The first type.
  - The second type.
  - Neither, I wouldn't risk my savings on investments.
  - A combination of both types.

**Situation Two:** Picture yourself driving down a road you know well. The road is slightly slippery but you are late for an appointment.

2. How fast are you going?
  - I am speeding.
  - I am going at or below the speed limit.
  - I am going slightly over the speed limit.
3. Your spouse or partner is driving in the same situation. S/he is speeding.
  - I would insist s/he slow down.
  - S/he would never speed under those conditions.
  - I would suggest s/he slow down.

**Situation Three:** Your supervisor has left the office for the day when you receive a call from a member of the Board of Directors of your agency who is asking you to discuss a nephew of his who is currently a client receiving services from the agency. You have heard your supervisor discuss this case with the board member before. What do you do?

4. What do you do?
  - I wait for my supervisor to return the next day; the potential to get in trouble is too high.
  - I evaluate my options but go ahead and discuss the case.
  - I discuss the case without hesitating.
5. You overhear the Board member asking a colleague of yours for more information on a the nephew. What do you do?
  - Recommend the colleague wait for the supervisor to return the next day; the potential to get in trouble is too high.
  - Help the colleague evaluate options but recommend it is ok for the colleague to discuss the case.
  - Encourage the colleague to discuss the case.

6. I \_\_\_\_\_ look for new ways to drive or walk to work.

- Always
- Often
- Sometimes
- Rarely
- Never

7. Long term care insurance is...

- Essential
- A good idea
- Only necessary if you have dependents.
- A waste of money.
- Practically inviting disaster.

8. Successful people are usually very lucky.

- Completely true
- Mostly true
- Somewhat true/Somewhat false
- Mostly false
- Completely false

9. Does your residence have smoke detectors?

- Yes, and I am sure they work.
- Yes, but I am not sure they work.
- I don't know.
- No

10. When you stay in a hotel, do you check out the emergency exits?

- Yes, every time.
- Yes, most of the time.
- Sometimes
- Rarely
- Never

11. Do you wear a seat belt?

- Yes, every time I am in a car.
- Yes, most of the time.
- Sometimes
- Rarely
- Never

12. Do you make others who ride in your car wear a seat belt?

- Yes, every time.
- Yes, most of the time.
- Sometimes
- Rarely
- Never

13. You're traveling abroad to a developing country. Do you stay in the safe, tourist-friendly areas, or venture into uncharted territory?

- I wouldn't travel to an exotic locale.
- I would sure to stick to the areas recommended in guidebooks.
- I would stick to the recommended areas unless I have a trustworthy guide.
- I would make my own path and seek out uncharted territory.

14. Would you quit your job without finding another one first?

- Yes
- No
- Not unless my current situation were unbearable.

15. Would you encourage a friend to quite a job without finding another one first?

- Yes
- No
- Not unless his or her current situation was unbearable.

16. To perform well, I need to know the outcome of my work in advance.

- Strongly agree
- Agree
- Somewhat agree/somewhat disagree
- Disagree
- Strongly disagree

17. If I take a risk and fail, I can handle the consequences.

- Strongly agree
- Agree
- Somewhat agree/somewhat disagree
- Disagree
- Strongly disagree

18. Which of the following activities would you be willing to participate in? Which would you no care if a friend participated in?

	<b>Ok for me</b>	<b>Ok for a friend</b>
Watching a scary movie	_____	_____
Sky-diving	_____	_____
Illegal drag racing	_____	_____
Going to a Mongolian restaurant	_____	_____
Opening a dot.com business	_____	_____
Watching a new reality TV show	_____	_____
Trying a sushi	_____	_____
Taking belly-dancing lessons	_____	_____
White-water rafting	_____	_____
Hitchhiking	_____	_____
Rock-climbing	_____	_____
Bungee jumping	_____	_____
Running with the bulls	_____	_____
High-stakes gambling	_____	_____
Traveling to a developing country	_____	_____
Changing careers	_____	_____
Investing in the stock market	_____	_____
Skipping out on a restaurant check	_____	_____

## Risk Tolerance Quiz Scoring

**Situation One:** You inherit a large sum of money and your financial advisor suggests two types of investments. In the first investment, you invest a moderate, set amount, and receive a modest guaranteed payoff at the end of the investment. The second choice includes a much larger investment (most of your inheritance) but also has a larger potential payout—it also includes the possibility of losing all your money in an economic downturn.

19. Which type of investment would you choose?

- The first type. (2)
- The second type. (3)
- Neither, I wouldn't risk my savings on investments. (0)
- A combination of both types. (1)

**Situation Two:** Picture yourself driving down a road you know well. The road is slightly slippery but you are late for an appointment.

20. How fast are you going?

- I am speeding. (2)
- I am going at or below the speed limit. (0)
- I am going slightly over the speed limit. (1)

21. Your spouse or partner is driving in the same situation. S/he is speeding.

- I would insist s/he slow down. (1)
- S/he would never speed under those conditions. (0)
- I would not say anything. (2)

**Situation Three:** Your supervisor has left the office for the day when you receive a call from a member of the Board of Directors of your agency who is asking you to discuss a nephew of his who is currently a client receiving services from the agency. You have heard your supervisor discuss this case with the board member before. What do you do?

22. What do you do?

- I wait for my supervisor to return the next day; the potential to get in trouble is too high. (0)
- I evaluate my options but go ahead and discuss the case. (1)
- I discuss the case without hesitating. (2)

23. You overhear the Board member asking a colleague of yours for more information on the nephew. What do you do?

- Recommend the colleague wait for the supervisor to return the next day; the potential to get in trouble is too high. (0)
- Help the colleague evaluate options but recommend it is ok for the colleague to discuss the case. (1)
- Encourage the colleague to discuss the case. (2)

24. I \_\_\_\_\_ look for new ways to drive or walk to work.

- Always (3)
- Often (2)
- Sometimes (1)
- Rarely (0)
- Never (0)

25. Long term care insurance is...

- Essential (0)
- A good idea (1)
- Only necessary if you have dependents. (1)
- A waste of money. (2)
- Practically inviting disaster. (3)

26. Successful people are usually very lucky.

- Completely true (0)
- Mostly true (0)
- Somewhat true/Somewhat false (1)
- Mostly false (2)
- Completely false (2)

27. Does your residence have smoke detectors?

- Yes, and I am sure they work. (0)
- Yes, but I am not sure they work. (1)
- I don't know. (2)
- No (2)

28. When you stay in a hotel, do you check out the emergency exits?

- Yes, every time. (0)
- Yes, most of the time. (0)
- Sometimes (1)
- Rarely (2)
- Never (2)

29. Do you wear a seat belt?

- Yes, every time I am in a car. (0)
- Yes, most of the time. (0)
- Sometimes (1)
- Rarely (2)
- Never (2)

30. Do you make others who ride in your car wear a seat belt?

- Yes, every time. (0)
- Yes, most of the time. (0)
- Sometimes (1)
- Rarely (2)
- Never (2)

31. You're traveling abroad to a developing country. Do you stay in the safe, tourist-friendly areas, or venture into uncharted territory?

- I wouldn't travel to an exotic locale. (0)
- I would sure to stick to the areas recommended in guidebooks. (1)
- I would stick to the recommended areas unless I have a trustworthy guide. (1)
- I would make my own path and seek out uncharted territory. (2)

32. Would you quit your job without finding another one first?

- Yes (2)
- No (0)
- Not unless my current situation were unbearable. (1)

33. Would you encourage a friend to quite a job without finding another one first?

- Yes (2)
- No (0)
- Not unless his or her current situation was unbearable. (1)

34. To perform well, I need to know the outcome of my work in advance.

- Strongly agree (0)
- Agree (0)
- Somewhat agree/somewhat disagree (1)
- Disagree (2)
- Strongly disagree (2)

35. If I take a risk and fail, I can handle the consequences.

- Strongly agree (2)
- Agree (2)
- Somewhat agree/somewhat disagree (1)
- Strongly disagree (0)

36. Which of the following activities would you be willing to participate in? Which would you not care if a friend participated in?

	<b>Ok for me</b>	<b>Ok for a friend</b>
Watching a scary movie (0)	_____	_____
Sky-diving (3)	_____	_____
Illegal drag racing (3)	_____	_____
Going to a Mongolian restaurant (1)	_____	_____
Opening a dot.com business (2)	_____	_____
Watching a new reality TV show (0)	_____	_____
Trying a sushi (1)	_____	_____
Taking belly-dancing lessons (1)	_____	_____
White-water rafting (1)	_____	_____
Hitchhiking (1)	_____	_____
Rock-climbing (1)	_____	_____
Bungee jumping (2)	_____	_____
Running with the bulls (3)	_____	_____
High-stakes gambling (3)	_____	_____
Traveling to a developing country (2)	_____	_____
Changing careers (2)	_____	_____
Investing in the stock market (1)	_____	_____

**Scoring:**

0–24 (Highly risk averse)

25–50 (You can tolerate a small amount of risk)

51–75 (You can tolerate a moderate amount of risk)

Over 76 (You are a risk seeker)

**Note:** This quiz has not been scientifically validated and is presented for discussion purposes only for this training.

## CASE HISTORY 1: Mrs. Mertes

Mrs. Mertes is a 65-year-old woman who has multiple health problems including chronic lung disease, severe osteoporosis, arthritis, and chronic depression. She has no cognitive limitations and is very capable of making decisions about what she wants. Although technically she is not bedridden, she spends most of her days in her bed watching television and talking on the telephone. She lives with her husband (83 years of age) who has his own health problems but does not appear to need services other than perhaps housekeeping and meal preparation. He is able to prepare meals but usually does not and the couple eats prepared frozen and canned foods most of the time. Mrs. Mertes doesn't mind eating so simply but her physician has indicated that the high salt content in these prepared meals is dangerous for her blood pressure problem.

Mrs. Mertes has recently enrolled in the consumer-directed care option through Elder Services in her community hoping to get more services than the housekeeper and health care aide that come three times a week. She doesn't feel the aides have been doing enough for her in such infrequent visits. She is a difficult woman to work for because she is very demanding and inconsistent in what she expects of her workers. The couple has no extended family in the area.

### Note to consultant:

Mrs. Mertes is famous in agency circles for being very difficult to work with and always complaining about who and when the agency sends housekeeping and health care aides. Mr. Mertes is not a good choice for providing services as he has early dementia and is openly hostile to his wife. The couple is extremely isolated except for ongoing relationships with a local mental health agency and the agency that provides the aides. She is actually capable of cooking and doing light housekeeping but uses her health as an excuse not to. You see the need for home mental health care, a health care aide to help with bathing and personal hygiene, and someone to clean up the mess in the home which the Mertes' don't seem to notice.

### Note to trainee playing Mrs. Mertes:

Imagine how lonely and difficult it must be to be Mrs. Mertes, lying in bed all day with only the television to watch and to be living with a husband who rarely talks to her. What you really want as Mrs. Mertes is to have some company—the days are long and make you even more depressed than you already are. You want a decent meal cooked once in awhile and you want something for your husband to do that will take him out of the house and out of your hair. You want the right to hire and fire your own workers who will come when you want them to come and do what you want them to do.

**Decisions regarding service:**

- Reduce housekeeping services from 3 days a week to one day.
- Hire personal care assistant to come in every day from savings on housekeeping. Ask the personal care assistant to take her to movies and shopping.
- Arrange for home-based mental health services with a focus on couples therapy, after all Mr. Mertes is the one with the problem.

## CASE HISTORY 2: The Helsing Family

The Helsing family has three children including Marcia, a 10-year-old daughter with a cognitive disability for whom they have been caring since birth. Marcia has no self-help skills, needs to be fed, bathed, and constantly supervised. She is able to crawl but is not otherwise ambulatory. Kathy, the mother, is the primary caregiver for Marcia although Bob, the father helps when he comes home from work. Their other two children Kara (16) and Kevin (12) occasionally care for Marcia but are busy with their own school and sports activity. The Helsing family has never used any agency services for their daughter although they have been eligible for such services since Marcia's birth. The couple is experiencing family tension as Marcia becomes more challenging to care for and Kathy has developed back problems from lifting her for so many years. Bob feels like he has "lost" his wife to caring for their daughter and really misses the time they used to spend together. The other children basically stay away from home as much as possible because they feel no one pays attention to them anyway because of all the attention Marcia needs.

### Note to consultant:

This family is coming apart at the seams as the amount of work caring for Marcia continues to increase. They have always felt they should be able to care for Marcia without outside help but this is becoming more difficult as Kathy's back problems worsen. Everyone in the family seems depressed and desperate. They have mentioned putting Marcia in a care facility although you know that is not financially feasible for this family regardless of who pays for the care. They have to find a way to provide this very labor intensive care for Marcia without having their family fall apart.

### Note to trainee playing Kathy Helsing:

You are very tired and in almost constant pain with your back problems but you strongly feel you are the best person to provide care for Marcia. You think getting paid yourself for caring for Marcia might be the best for Marcia but could spell trouble for you. You vacillate between being overprotective of Marcia and wishing she would die and put everyone out of their misery. You want your life back. You want to save your marriage before it falls apart. You want your children to be home more so it feels like a real family rather than a day care center for a cognitively disabled daughter. You feel isolated and angry. And you are very sick of "professionals" telling you that you just need a few days away from Marcia. Most days you just want to run away from it all.

### Decisions:

- Release Marcia for adoption with an option for visitation.

### CASE HISTORY 3: Ellen Ellis

Ellen Ellis is a 25-year-old woman with moderate developmental disabilities. She has lived in a structured independent living apartment with two other women for about a year. She works at a day care center and is able to make enough money to pay her portion of the rent and buy food and basic necessities. She can cook simple meals and is capable of keeping her room tidy. However, she and her roommates all struggle with housekeeping tasks resulting in a very messy living situation. It is not clear whether Ellen knows how to do serious cleaning and won't or doesn't really understand the process of housekeeping. She also has difficulty in understanding and handling money. When she was given an ATM card, she kept taking money out of her account until she was overdrawn every month, not quite understanding how the ATM card works with her money. She is very generous by nature and is always giving other people money when they ask, even if she cannot afford to. She has been victimized several times by people who "befriended" her only to take her money. She loves to go out to bars to meet people and dance but occasionally has trouble finding her way home. When she is confused, she takes a taxi, another expense she cannot afford. She forgets appointments with her doctor and counselor on a regular basis because she has difficulty in keeping a personal calendar.

#### Note to consultant:

Ellen is very outgoing and friendly. It is easy to see why she is taken advantage on a regular basis. She wants friends and to have a social life but it rarely seems to work in her favor. You suspect she probably could learn housekeeping skills, if taught and structured, but like most people she doesn't like doing housework. Her roommates are also mildly developmentally disabled and not much help in keeping Ellen on track. She is a loyal employee and well-liked at her job so she is capable of good relationships. She is a disaster with money but doesn't want to have someone give her an "allowance" to solve the money problem. She is strong-willed and somewhat temperamental but is serious about wanting some assistance in improving her life.

#### Note to trainee playing Ellen:

You know very well you have screwed up with your money but it is all so complicated that you wonder if you will ever straighten it out. You don't want someone to give you an allowance or control your money—that is what happened when you lived at home with your parents. Who cares if the apartment is a mess—it doesn't seem to bother your roommates and no one ever sees the place. Like others, you want to go out and meet people at night clubs. You just want a life like other young adults and hope to meet someone special to share your life with.

**Decisions:**

- Ellen wants to get a second job so she can hire a housekeeper so avoid the conversation about the messy apartment.
- Go back to check writing and give up the ATM card.
- Get an additional roommate to solve financial pressu



