Integrated Care System
Nottingham & Nottinghamshire

NHS
Nottingham and Nottinghamshire
Clinical Commissioning Group

A practical guide to delivering exceptional Personalised Care

Includes 9 skills areas to master with 9 supporting tools that you can use to deliver higher levels of personalised care

Made in partnership with

HEALTH COACHING ACADEMY

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What is this booklet?

- A toolbox for you to dip in and out of
- A step-by-step guide in delivering personalised care
- A bunch of practical tools for when you need them

How to get the best out of this guide

This 'Practical guide to delivering exceptional Personalised Care' has been produced in partnership between Nottingham & Nottinghamshire's Integrated Care System and the Health Coaching Academy. This is in response to many service users and front line staff asking for a clear understanding of how to be even better at personalised care.

This collection of models, tips and resources has been designed as a reference for you to dip in and out of as you see fit, and for you to tailor to your own practice. For example, each page might give you an idea of one question to ask to make your conversations even more person-centred.

Feel free to use and adopt what you find useful, as and when you feel is appropriate, building on your already well-developed skills.

If you're a manager or team leader, you may find discrete sections really helpful in supporting your staff.

As a 'route through' this workbook, we will start with the 10 core principles underpinning personalised care, and will then move on to look at specific skills, ideas and techniques in more detail. This book contains a series of nine skill areas needed to deliver great levels of Personalised Care, along with nine supporting tools to enable you to put these new skills into action.

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Introduction

Personalised care means people have choice and control over their care and the way this is planned and delivered, based on ***what matters to them*** and their individual strengths, needs and preferences. This happens when those within the system of health and social care support people they are working with to stay well for longer, and make the most of the expertise, capacity and potential of people, families and communities. This will deliver better health and wellbeing outcomes and experiences for everyone. For clarity, the terms personalised care and person-centred care are often used interchangeably and generally refer to the same approach.

The evidence of the positive impact of personalised care continues to grow. Personalised care also helps to address health inequalities, taking account of people's different backgrounds and preferences, which means people from lower socio-economic groups are often able to benefit the most.

Research has shown that people who are more confident and able to manage their health conditions (that is, people with higher levels of activation) have 18% fewer GP contacts and 38% fewer emergency admissions than people with the least confidence. (These figures are based on the tracking of over 9,000 people with long-term conditions across a health and care system.)[1]

It's all about working with people in partnership.

Working in partnership is key to personalised care. This toolkit explores the how to be an even better partner in delivering personalised care and increase the level of ownership, motivation and confidence in the people we work with. It's worth bearing in mind that the extent to which someone takes ownership and responsibility within a partnership will vary depending upon the situation:

1. In an emergency, as a practitioner, you will step in and take responsibility, using your professional knowledge and skills.
2. Where there is significant need for professional input, you will share a great deal of your skills and knowledge.
3. Often, however, the best health outcomes for many people lie in them taking greater ownership for their health and care. The person you are working with will bring their own knowledge about their life and their own capabilities and you will bring your own skills and knowledge of best practice care. Working together in partnership you can achieve even greater outcomes.

1: Health Foundation Briefing: Reducing emergency admissions – Unlocking the potential of people to better manage their long-term conditions by Sarah Deeny, Ruth Thorlby & Adam Steventon, 2018

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10 Core Principles of

Personalised Care at its best

Applying the core principles in our conversations will facilitate a shift in the job we do and the outcomes we strive for. It empowers a change in the belief-system of the people we work with, raising motivation, enthusiasm and confidence to do more on their own. This means that, as professionals, we can feel 'lighter' at the end of the day, get more job satisfaction and see even better outcomes for the people we work with.

1. Partnership working: You and the person you are working with are equals; the practitioner brings health and care knowledge and expertise, and the person brings life, values, preferences, experience and expertise. When working with adults, we know the best outcomes come from having adult-to-adult conversations, as opposed to conversations with a 'parent-child' dynamic. You use the person's language in conversation and take responsibility to enable the person's understanding.

2. Build greater independence: Every conversation creates greater opportunity for ownership and sustainable self-care. Assume the person you are working with has capacity to act independently and make their own free choices until proven not to be the case.

3. Unconditional positive regard: This is the belief in the capacity and capability of others, which means accepting and respecting others as they are, without prejudice, judgment or evaluation, and with compassion. When we begin with a belief that people are whole, creative and resourceful, we can be surprised at just how much they

4. Focus on what matters to people: This encompasses the entirety of the person's life, work, values and preferences; place their health and care within this context. Our starting point is to ask, *"What matters to you?" and "What's most important to you at this time and going forwards?"*

5. Explore what motivates people: Work with them to identify their 'towards' motivations (what they want = positive), rather than 'away from' motivations (what they don't want = negative). Ask, *"What is it you want?"*, and, *"What would good be like for you?"*.

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6. Assume they know best what will work for them: Ask open questions with the intention to help them find out. Empower them to take ownership of their own health and care as far as is possible. Ask, ***"How would you like to take this forward?"***. Be mindful of traps we fall into, such as leading questions/suggestions disguised as an open question – for example, "Have you thought about…?".

7. Fulfil your duty of care: share your expertise, knowledge and best practice in a way that builds on that of the person you are working with, adding to their thinking and ideas. Invite the person to explore options and choose the way forward that most resonates with them; this way, they will be more motivated to follow through with it. Do what you must do, but don't take the whole responsibility.

8. Help build their knowledge, skills and confidence: Explore what they already know about themselves and their health and care (health literacy) and what they do or have done (even if they haven't recognised it themselves). **Appreciate, acknowledge and affirm.**

9. Co-create support and care plans with powerful outcomes: These need to be meaningful to the person you are working with: ask and explore questions such as:

- *What is important to you?*
- *What could you do?*
- *What will you do?*
- *What might get in the way?*
- *How will you get around these barriers?*
- *How realistic is it?*
- *When will you start?*

10. Empower people to make informed choices and decisions: Collaborate to enable choice and enact Shared Decision Making. Invite the person to share thoughts and knowledge of options. Understand and respect their life, values and preferences. Share your thinking and best practice, explore the risks and benefits of all of these – explore the person's preferences. The person you are working with then chooses; they decide what is best for them.

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

- Maya Angelou -

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SKILL AREA 1

How to manage stress & be kinder to yourself

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Skill Area 1

How to manage stress & be kinder to yourself

KEY POINTS	
Notice how you are feeling	Reflect and make a plan
7/11 Breathing	Take action – on things in your control
Smile (even when you don't feel like it!)	Celebrate – what's gone well everyday
Get outside	Capture your gratitude
Get perspective - step into your helicopter	Do something for someone else
See page 38 for the "TIME Conversation Flow tool" to work with	

Personalised care starts with you

Personalised care starts with you. You are champions and leaders of health, care and wellbeing. **You matter**. Looking after yourself means you will be able to support others better.

To draw an analogy, think about the safety advice you are given on an aeroplane. In the event of an emergency you are told to put the oxygen mask **on yourself first**, before helping others.

This is because if you have a good supply of oxygen, you will be better placed to help those around you who are in need. The same is true in delivering personalised care.

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10 ways to effectively manage stress

Here are some evidence-based and proven approaches to improving wellbeing that you might find helpful.

1. Notice when you are feeling stressed or overwhelmed – be compassionate towards yourself.

2. Pause and breathe… take a moment for yourself and do it often.
    a. Take a deep breath in for the count of seven and let the air out very slowly for the count of 11; this calms the sympathetic nervous system and exercises the Vagal Nerve. This is brilliant for reducing stress and lowering blood pressure. In fact, do this regularly even when you are feeling fine! Build a reserve of resilience.

3. Smile – it releases feelgood hormones, even if you are not feeling happy!

4. Go outside – get some full-spectrum light in your break. This releases serotonin, your 'happy hormone'.

5. Gain perspective – climb into your imaginary helicopter and view the situation from afar.
    a. Check in with yourself and ask, "How am I feeling?"
    b. Label the emotions – ask yourself, "What is causing me to feel this way?", "What are the facts here?"
    c. Check what's in and out of your control or influence

6. Reflect and make a plan – ask, "What is in my control?", "What can I do for myself that will help me to feel better?"

7. Take action – do something that will help, no matter how small. Ask yourself, "Is there someone who could help with this?"

8. Celebrate what you have done every day. Ask yourself, "What are three things that went well today?" Allow yourself one thing you could do 'even better next time'

9. Keep a record of gratitude – make a note in a journal every day of something you are grateful for.

10. Do something for someone else

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SKILL AREA 2

How to have an even better person-centred conversation

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Skill Area 2

How to have an even better person-centred conversation

KEY POINTS	
Smile	Use plain English
Establish a partnership	Establish progress
Agree expectations & set boundaries	Do not make assumptions
Get curious	Build confidence – celebrate and affirm
Listen	
See page 39 for the "Creating SMART Outcomes tool" to work with	

9 ways to have better conversations

1. Smile: slow down, and recognise your body language, tone of voice, speed, volume and words to impact the person you are working with.

2. Partner: establish a partnership. You are equals – have an adult-to-adult conversation.

3. Agree expectations and set boundaries: "We have x minutes together; what would you most like to get from our conversation today?".

4. Get curious: ask questions such as, "What is most important to you?", "What matters most to you?" then ask, "Can I share what's on my mind?".

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5. Listen: to understand and not speak, get comfortable with silence. Be a good thinking partner. You might think it will take longer, but once we understand what is going on for people, it's easier to support them into action. Say, "Tell me more about… I'm curious about that…"

6. Language: use plain English. Keep it simple. Use their own language – it shows you are listening and value them. Use short sentences. Ask one question at a time. Use 'What' and 'How' questions.

7. Progress: establish where they are with this now. Ask, "What thinking have you already done around this?", "What progress have you already made?" – this assumes that the person has already thought about it and may have already done something.

8. Assumptions: don't make any, except that they know what will work best for them. Always ask first, "What ideas/thoughts do you have?".

9. Build confidence: celebrate and affirm. Look for every opportunity to notice and acknowledge what they have already achieved. At a minimum you might say, "It took a lot of [courage, effort, energy, self-will, etc.] to come here to have a conversation with me today", or "I can see you have already done some thinking about this."

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SKILL AREA 3

How to have a conversation that encourages independence, self-management and self-care

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Skill Area 3

How to have a conversation that encourages independence, self-management and self-care

KEY POINTS	
Sometimes just one question is enough	Create options - start with the person's thoughts; "What ideas do you have?"
Share expectations at the outset	Share your ideas, only after they have shared theirs.
Listen; it takes less time than you think and is more impactful than you can imagine	The person chooses what will work for them
Assume prior thinking and skills	Finish with a small step forward; "What will you do?"
See page 40 for the "Importance & Confidence Scaling tool" to work with	

'Provide the fishing rod, not the fish'

Top tips:

- Conversations flow up and down
- Ask open questions one at a time
- Listen loads, then listen some more!
- Hold back on advice until later in the conversation, then share your knowledge and best practice
- Empower the person to make informed choices and decisions that work for them

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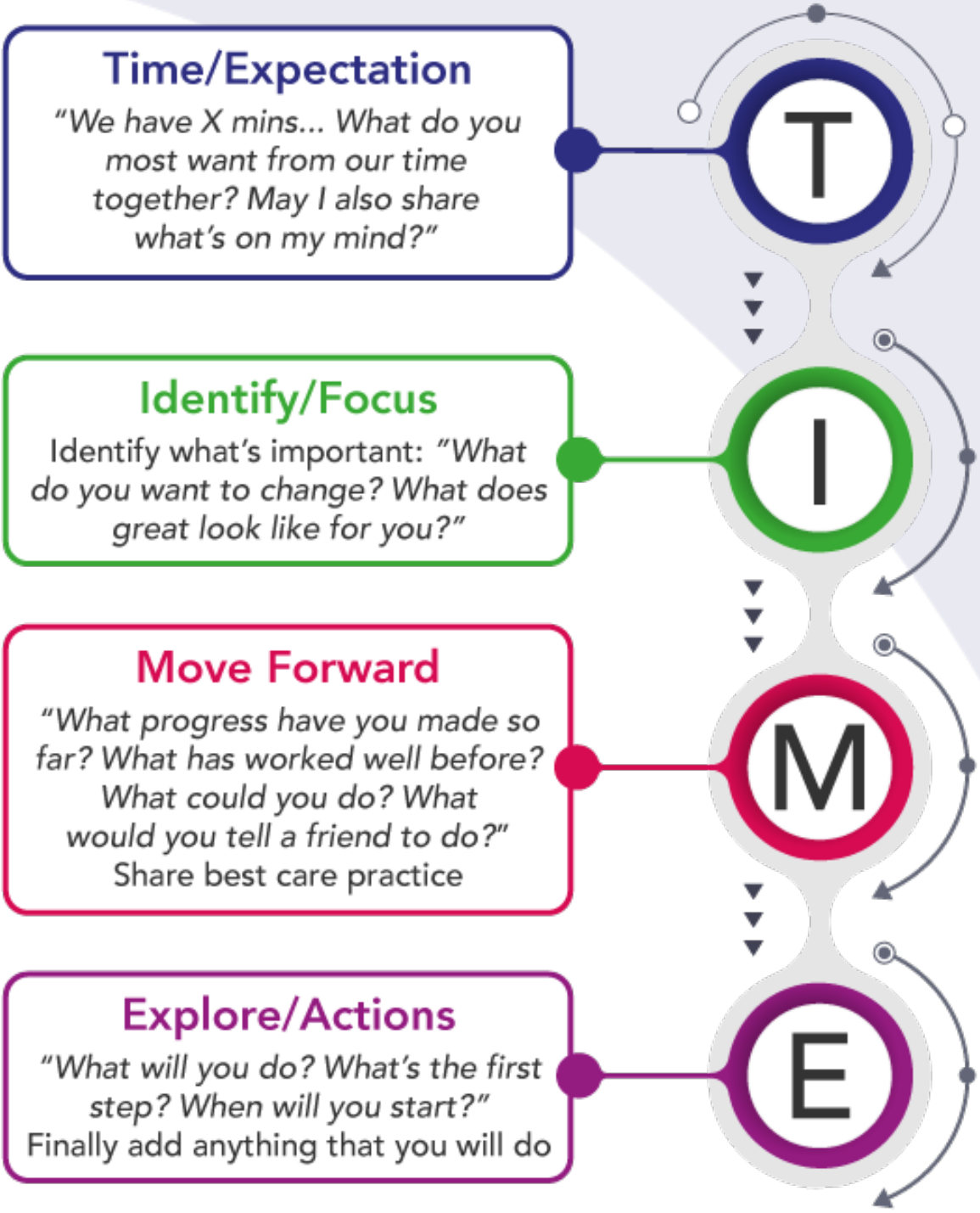
Here is how a conversation might go:



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SKILL AREA 4

How to Co-Create Meaningful and Powerful Outcomes

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Skill Area 4

How to Co-Create Meaningful and Powerful Outcomes

KEY POINTS	
Outcomes are different from outputs	Make them SMART, present tense, positive, personal and possible
Outcomes focus on what people want	Break down into small, achievable steps
Achieving outcomes people choose for themselves can boost confidence and motivation	Ask questions to create a positive vision of the future, visualise or use "If I could, I would…"
Check the outcome is in the person's influence; if not, who else needs to be involved?	
See page 41 for the 'Decision Making Profile' & page 43 for the 'Perfect Week' Tools	

OUTPUT

"I want to lose 1 stone in weight"

VS

MEANINGFUL OUTCOME

"I am confident of my new slimmer figure and I am enjoying wearing my size 16 summer dress by July 29th ready for my holiday"

Importance of Outcomes over Outputs

- Outcomes focus attention on what matters to people; something they want. If something is important to us, we are more likely to put our effort into achieving it. Setting outcomes is one of the most important tools when we are supporting people to self-manage.
- Outcomes are things people choose for themselves; if we e tell people what to do, they are less likely to be motivated to do it. When the people we work with choose outcomes for themselves, they are more likely to overcome problems and obstacles, and be successful.
- Outcomes provide a sense of achievement: When people achieve an outcome they have chosen for themselves, however small, it gives a sense of achievement and helps them feel good about themselves. When we are working with people with low activation (motivation and confidence), partnering with them to choose one small step (that matters to them and is achievable) can be the start of a very positive journey.

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Co-Creating Outcomes

- Ask questions to create a positive vision of where this person wants to be, or what they want to have. This can take time. It is worth investing time in this part of the conversation, as the solutions/actions the person then wishes to take will come more easily once they have identified what is important to them. You can ask them to imagine and use visualisation (of what would be happening if they had achieved their outcome; what would they see, hear, feel, smell), or ask them to think about the statement, "*If I could, I would…*"
- The outcome can then be broken down into outputs (small steps)
- Meaningful Outcomes are assisted by following the 4P model below

Use the 4Ps for Meaningful Outcomes

PRESENT TENSE

anchors us with the positive feelings we will have when we have achieved it

POSITIVELY STATED

connects us to our vision of achieving it and helps us notice and focus our attention on all the benefits associated with achieving it.

PERSONAL FOR ME

what matters to me – it's in my circle of control or influence, and I am more motivated when it is personal; if the outcome is out of the person's control, who else needs to be involved?

POSSIBLE IN CONTEXT

something that is achievable will boost confidence and feelings of positive self-worth and self-esteem which, in turn, will help boost motivation. If it's not possible yet, break it down into chunks; make the outcome a small possible step towards something instead.

Example

Suggest the person you are working with begins writing their outcomes in this way:

'I am…' or 'I have….'

Not like this: "It will be less stressful and I will not be worrying constantly about everything"

Instead like this: "I am calm and relaxed as I go about my day. I am writing down any concerns as they come along and letting them go in the moment."

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SKILL AREA 5

How to enact Shared Decision Making (SDM) – An empowering partnership

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Skill Area 5

How to enact Shared Decision Making (SDM) to create an empowering partnership

KEY POINTS	
Ask open questions; "What matters to you?" "What concerns you?"	Explore person's preferences ask "how do you like to make decisions?"
Collaborate, work together, co-create	Explore risks, benefits, & challenges
Share knowledge	Person makes informed choice
Share care best practices	
See page 41 for the 'Decision Making Profile' & page 45 for the 'Options Review Tool'	

Whose decision is it? Enabling them to make the decisions

Empower people to make informed choices and decisions

Making choices and decisions ranges from the most mundane to the highly complex. Apply all the principles of personalised care and specifically:

1. Collaborate based on what's important to the person:
    - Collaborate through conversation; this is a journey between you. Show respect for the person's values, preferences, experience, language and health literacy. Ask open questions in plain English.
    - You might ask:
        - *"What matters to you about…?"*
        - *"What is important to you about…?"*
        - *"What is important for you about…?"*
        - *"What are your concerns?"*
        - *"What do you want to take into consideration here?"*
        - *"How might we adapt this to take this/that into account?"*
        - *"How do you like to make decisions?"* - See Decision Making Profile in Tool 4 for extra guidance

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1. **Share knowledge**
    - Invite the person to share thoughts/knowledge of options, informed by their life, values and preferences and level of health/care literacy.
    - You may ask:
        - *"What options are you aware of?"*
        - *"What are your initial thoughts about them?"*

2. **Share care best practices**
    - Share your expertise, thinking and best care practices. List them and point the person to high-quality, unbiased and evidence-based decision aids to help people obtain information on decision options. E.g. pre-printed booklets or web-based resources.
    - You might say:
        - *"These are the alternatives based on evidence and research, which I am aware of in my experience/expertise and which are recommended in these situations."*
        - *"Let's explore them all together."*

3. **Explore risks, benefits, challenges and opportunities of options**
    - Ask open questions to understand the person's perspective of the various options available to them. Share your knowledge and the evidence-based risks and benefits.
    - Explore the risks, benefits and the person's thoughts about the challenges and opportunities that occur to them.

4. **Explore the person's preferences**
    - Work with them to weigh up each of the options from their perspective. Ask, *"What would be the benefits, risks, challenges and opportunities of each these from your perspective?"*
    - Share the evidence base, best practice, experience, etc.

5. **The person makes an informed choice and decides what is best for them**
    - Ask: *"Given all that we have discussed, and you have explored for yourself, what option most appeals to you?"*
    - *"What is the [quickest, easiest, most impactful, cheapest] option for you?"*

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SKILL AREA 6

How to build people's ownership and reduce your workload

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Skill Area 6

How to build people's ownership and reduce your workload

KEY POINTS	
Acknowledge the problem	Explore who can do something
Examine the problem	Explore what the person *could* do
Ask what good would look like	Agree what they *will* do - next steps
Explore where the person is now	
See page 45 for the Option Review Tool to work with	

"Don't take the Monkey!"

Unresolved problems can be described as Monkeys…

In 1974, William Oncken Jr. and Donald L. Wass published an article in Harvard Business Review that referred to unsolved problems as 'Monkeys'. It described the problem of managers unwittingly reducing their effectiveness by taking ownership of Monkeys that rightfully need to stay with the employee.

We can use this analogy in a health and care setting. This is a simple process to enable and support the person you are working with to leave with the problems that only they can solve, such as lifestyle changes to improve their health and wellbeing.

The Monkey is the problem.

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An Example: Weight Loss

Let's have a look at an example: A person you are working with has weight issues. You ask what matters to them, *"What would you like to be different in your life?"*, and they say, *"I am breathless and find it difficult to climb the stairs."* This person is already on the optimum medication and nothing else can be done clinically.

1. Acknowledge the Monkey exists
    - "I understand that you are breathless and finding it difficult to climb the stairs. This must be hard for you."
    - Acknowledge too that there is nothing further that can be done medically for them. "Let's have a look at this a little further."

2. Get the Monkey onto the table and examine it
    - Ask open questions and listen carefully: "What do you think is contributing to your breathlessness and difficulty in climbing the stairs? What else?"
    - Ask permission to offer your thoughts: "May I offer some thoughts on this? I have found that other people I have worked with, with similar issues, have found losing weight – even just a few pounds – to have made their breathing difficulties better", or, "Recent research suggests that x, y or z is excellent for making improvements here."
    - They may even offer, "I know that if I lost some weight it would make a difference, but I find it hard."

3. Ask the person what good would look like if the Monkey was no longer there – in other words:
    - If the problem was solved, what would be happening? "If you were able to lose weight…"
        - "…what would great be like for you?
        - "…what would the benefits be for you of breathing more easily when climbing the stairs?", "…what would it mean to you?"
        - "How important is getting these benefits to you, on a scale of 1-10?"

4. Explore where they are now with the Monkey
    - What is currently happening?
        - "What have you already tried to change?"
        - "What has worked well when you have lost weight in the past?"
        - "What progress have you made?"
        - "When was it better for you?"
        - "What did you do?"

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5. Explore who can do something about the Monkey – mapping the circle of control
    - What roles do the person and practitioner play in resolving the Monkey?
        - You could draw two circles – one for them and one for you – and ask, "What is in your control and what is in mine?", "What are all the things that you can control?" [See Skill Area 7 on page 27 for more information]
    - Whose responsibility is it?

6. Explore what they could do
    - Check in to explore their motivation to do something
    - Use scaling – ask, "On a scale of 1-10, where 1 is unlikely and 10 is definitely wanting to do this, where would you score yourself?"

7. Agree next steps
    - "What's your first step?"
    - "If there is something in your circle of influence, what will you do?"
    - "What will you do?"
    - "When can you start?"

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SKILL AREA 7

How to increase ownership and clarify responsibility

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Skill Area 7

How to increase ownership and clarify responsibility

KEY POINTS	
Taking responsibility means being proactive	Using the circles can help visualise this
Proactivity is possible if it is something within the person's influence to do something about	Shifting a person's focus away from their circle of concern to their circle of influence is empowering and liberating
See page 19 for the 'Circles of Influence and Control' tool to work with	

The Responsibility Pie

Moving from Reactive to Proactive

Moving people from a reactive to a proactive focus is key to increasing self-management and self-care. To begin to increase their ownership and responsibility, one way of working with people is to use a great tool based on the **Circle of Influence** and **Circle of Concern**.

Sometimes, we find ourselves taking more responsibility than we have an influence over. People can expect us to do the impossible! Here is a neat tool to gently and visually have this conversation, in order to establish who is appropriately responsible for what.

Stephen Covey first developed the concept of the Circle of Influence and Circle of Concern in his book, 'The Seven Habits of Highly Effective People'.

Consider:

- What are you and the person you are working with independently responsible for?
- What is in your Circle of Concern and Circle of Influence?
- What is in the person's Circle of Concern and Circle of Influence?

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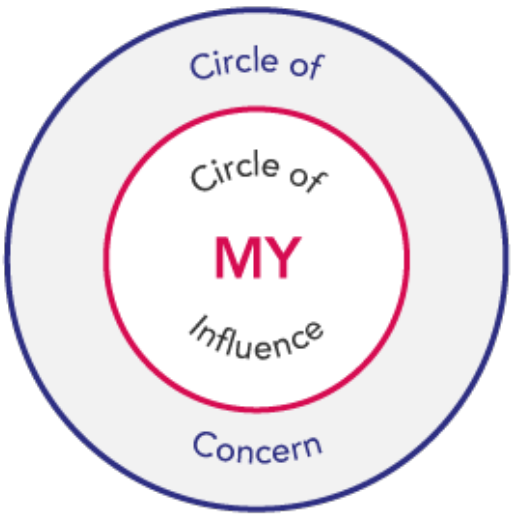
Key Questions to explore

1. Are you taking responsibility for more than is within your influence or control?
2. Where is there an overlap?
3. If you work in partnership, being clear about who can influence what, how might this change the conversation?

Sometimes, the people we are working with will pass the responsibility to us; sometimes, we take it from them. Sometimes, we assume responsibility with positive intent to help someone, because we care and want to help them. Unknowingly, we can disempower and reduce the confidence of the very person we want to take responsibility and ownership.

Working in a person-centred way means empowering others to increase their activation (knowledge, skills and confidence) to better self-manage and self-care. One way to start this is to work visually, exploring what the person you are working with can influence; what's in their Circle of Influence and what's in yours?

1. Draw two sets of circles on a sheet of paper, as shown below. *(also see page 19 for a more detailed version of this tool for you to use)*
2. *"What do you want to be different?";* ask the person to name the things that are impacting upon them and plot where they are situated. *"Where are they in our Circles of Influence/Concern?"* This can be a very impactful way of helping them to explore ownership and responsibility.
3. *"Of all the things you have identified in your Circle of Influence, what is the most important?"*
4. You can now move into your coaching-style conversation to explore what they could do about the issues and what steps they will specifically commit to as a result, to take them towards their desired outcome. (See page 38 for the TIME conversation flow tool for additional tips on how to best structure the conversation).



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SKILL AREA 8

How to explore options and find motivation for change

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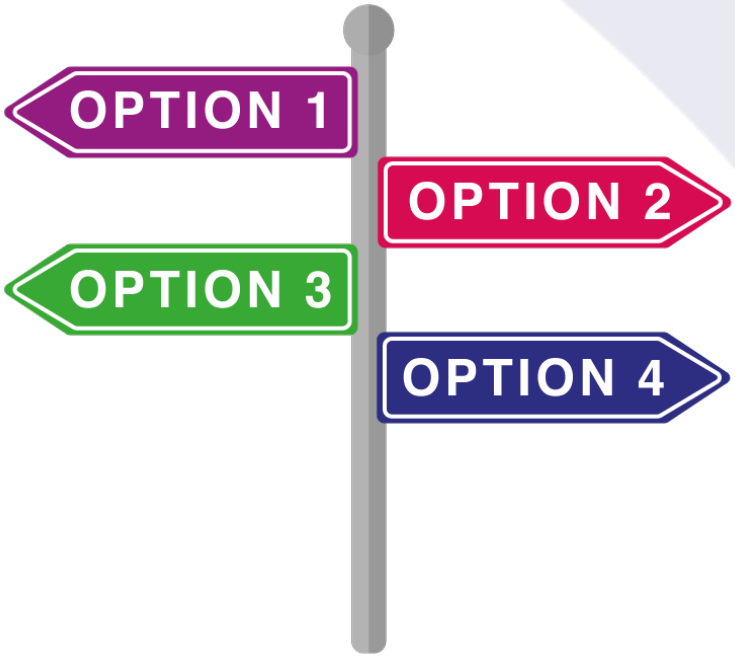
Skill Area 8

How to explore options and find motivation for change

KEY POINTS	
Explore what the person has in mind	Identify barriers
Seek permission to share own thoughts	Invite person to choose
Review options	Use scaling to explore motivation
See page 47 for the 'Solution Finding' tool to work with	



Listen & Understand

Having understood what is important to someone and explored where they are at the moment, we want to support people in identifying realistic options and getting into action.

We always want to start by listening to their ideas and thoughts and understanding their thinking.

Only then should we introduce our own ideas and suggestions.

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Here's how it can work:

1. **Explore what the person has in mind.**
    - Ask the person first for their ideas:
        - "What thoughts do you have?"
        - "What have you tried before?"
        - "When was it working well, and what was happening then?"
        - "What advice would you give a friend in this position?"

2. **Seek permission to introduce your own thoughts.**

    Ask:
    - "Would it be OK for me to share some thoughts I have?"
    - "There are some things that others have found useful/research suggests; would you be comfortable if I shared them with you?"

3. **Review the various options together – risks and benefits, challenges and opportunities.**
    - "What are your thoughts on these?"
    - "What are you now thinking?"
    - "Which of these most resonates/works for you?"

4. **Identify the barriers or things that may stop them implementing their chosen option.**

    Ask:
    - "What might get in the way?"
    - "What might stop you from doing that?"
    - "Who else needs to know?"
    - "Who else might support you with that?"

5. **Invite the person to choose the option that they prefer.**

    Ask:
    - "Of all these options and the things we discussed, which most resonates/works for you?"
    - "Which one would you most want to choose/take forward?"

6. **Use scaling from a scale of 1-10 to check in on how motivated they are.**

    Ask,
    - "On a scale of 1-10, where 1 is low and 10 is very motivated, how motivated do you feel to take this forward?"
    - See page 40 for an example of a scaling tool you can use

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SKILL AREA 9

How to work with people who are: stuck; not engaging; depressed; anxious

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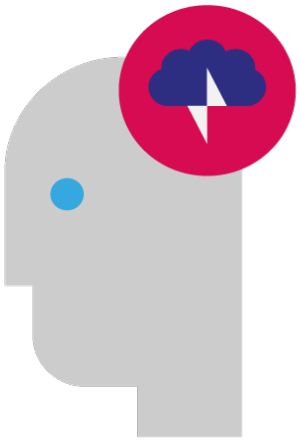
Skill Area 9

How to work with people who are: stuck; not engaged; depressed and/or anxious

KEY POINTS	
Ask person to consider all areas of their Health Wheel	Use questions to establish SMART outcomes
Explore their responses – what is that telling them?	Use the TIME conversation flow to empower them into action
Where would they want to start/see the most change?	Agree a first step that they will do
See page 48 for 'Health Wheel' tool to work with	



Working with people who are stuck, depressed, low in confidence/self-esteem, or exhausted:

- When a person you are working with is not engaged, motivated or activated to do anything, it can be frustrating both for you and them.
- There can be many reasons why they are feeling this way. Partnering with them to explore what they want to be different, even if it only one small thing, can be a catalyst for change. There are many ways of doing this.
- The Health Wheel is one tool that works really well to open up a conversation where someone seems stuck or is struggling to engage. It supports you to help them focus on all aspects of their life and health, and to identify where they would choose to start to change things for themselves.
- It's a very practical tool that you can work on together, or you can invite the person you are working with to have a go on their own and bring it back next time. You can then ask them to share what this is telling them about where they would like to see a change.

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How to use the Health Wheel

The Health Wheel is a great way to begin a journey of small steps, building motivation to do something different. There are 4 key stages, which include:

Stage 1: Ask the person you are working with to:

- Think about each of the 8 key areas of your life, as detailed in the Health Wheel.
- Add additional segments if you wish, or change the names of the segments if they are not right for you.
- Give yourself a score based on how happy you are with each, with 0 being not happy (satisfied/fulfilled) and 10 being very happy (satisfied/fulfilled).
- Shade in each segment up to your chosen score, to create a visual representation of your current wellbeing.

Stage 2: Ask the person:

- *"What is this telling you?"* Listen carefully to their response – don't interrupt.
- *"Where would you most like to make a change?"* Listen carefully and go with what **they** consider to be most important to them to make a start. Go with what is important to them, starting where there is motivation or desire to do something, no matter what it is. (It may not be the area with the lowest score.)

Stage 3: Develop SMART Outcomes

- The SMART Outcomes tool allows you to work up the outcome the person wants
- See page 39 for the `Creating SMART Outcomes' tool, which provides you with a framework to help your patient create goals that they will be more motivated to achieve.

Stage 4: Move the conversation towards action

- The TIME Conversation Flow tool allows you and your patient to work towards an action/next step through guided a conversation
- See page 38 for the `TIME Conversation Flow' tool, which covers:
    - T: Time & Expectations
    - I: Identify & Focus
    - M: Move Forward
    - E: Explore Actions

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SUPPORTING TOOLS

A selection of helpful resources and tools to help you in your personalised care journey

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Tool 1: TIME Conversation Flow

NOTE: This is a guide and not a linear process. Sometimes you may use elements of this, and sometimes all that is required is expectation setting, one powerful question and then gaining commitment. Play with this and find what works for you.

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Tool 2

Creating SMART Outcomes

How to help create SMART Outcomes

- Using SMART to form Outcomes will help to develop a realistic and motivating plan.
- This will raise the person's aspirations by asking them to consider:
    - If I could… I would …
    - E.g. If I could take my granddaughter to the park I would love it, my weight stops me…
- Ask the person to write it in the ***present tense***, and to make it ***positive*** (what they do want, not what they don't), ***personal*** (in their Circle of Influence), and ***possible*** (realistic) – asking questions such as:

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Tool 3

Importance & Confidence Scaling

Scaling is used to help the person get clarity on where they are and to help them build their motivation and confidence to take action.

Scaling is a meaningful tool to help us check in with people about how they feel in relation to a range of measures related to self-care and self-management; e.g. **level of importance, commitment, motivation and confidence.**

Scaling can also help identify any problems or blocks to achieving the outcome. For example:

- *"How important is this to you?"*
  - Scale of 1-10
  - 1 = very little level of importance and 10 = the most important thing

- *"How confident are you that you will do this?"*
  - Scale of 1-10
  - 1 = low confidence and 10 = 100% confident/certain

If the answer is mid-range, we might ask, *"What would make it one point higher?"*

- *"What would help you?"*
- *"Who could help you with this?"*
- *"Who else needs to know?"*

If the answer is low, e.g. 2-3, we would build motivation and confidence by:

- Noticing they already have motivation/confidence; celebrate that it is 2/3 rather than a 1. "It's good to hear you are saying 2/3 and not 1 – what makes it so?"
- Explore this and invite them to share this with you
- Saying it out loud is different to keeping it inside; it helps the person to acknowledge what they already have and may even push their confidence and motivation up a notch

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Tool 4

Decision Making Profile

- Keeping people at the centre of the process.
- Helping people have effective conversations by finding out…..
    - Their communication needs and preferences
    - And…. how they make decisions
- A useful tool for EVERYONE!

How I like to get information	How to present choices to me	Ways you can help me understand	When is the best time for me to make decisions?	When is a bad time for me to make a decision?

Example 1

How I like to get information	How to present choices to me	Ways you can help me understand	When is the best time for me to make decisions?	When is a bad time for me to make a decision?
I am a visual/kinaesthetic learner. I cannot take a lot of purely verbal/ written information in one go. Images, videos and diagrams help me a lot. Break information up into small chunks. Written information is best as list of bullet points rather than long sentences.	Present the options visually. Know that I may change my mind many times before I come to my final decision! I like to have all the information and options when it is important, but with more trivial choices (e.g. what I am going to wear that day). I prefer to be just given two options to choose from – I can find decision making a source of anxiety	Make a written record of conversations and give them to me Help me think through the 'pros' and 'cons' of each options and weigh these up. Don't overload me with too much information at once and give me enough time to process	When I am well/ not tired - afternoons are best. When I am with my husband, Tom - we make all important decisions together	When I am tired/ ill. When I have just woken up! When my anxiety levels are high

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Example 2

How I like to get information	How to present choices to me	Ways you can help me understand	When is the best time for me to make decisions?	When is a bad time for me to make a decision?
Written – a list of bullet points is better than lots of sentences	Know that I'll usually answer 'no' before I've had a chance to think about it & might change my mind. Give me time to think about it and check I've understood what you mean	Check I've understood the vocabulary by asking me if I know what a word means, e.g. do you know what independent means? Ask me to tell you what I think you've said to me. You will know if I haven't got the right meaning by what I say. If I haven't got it explain again. Help me to think about the different things that might happen depending on what I decide by giving me examples. I need time to think about it on my own – this might be about ten minutes. I like to read the information again	When I'm wide awake (usually the afternoon). When my brain's not busy thinking about something else	When I'm tired, early in the morning When my brain is full! I will be extra quiet if my brain is full.

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Tool 5

Perfect Week

Key points

- Develops the conversation from '*If I could…I would…*'
- Helping the person think about how they currently spend their time, and how they would like this to be different.
- Create an aspirational 'perfect week' – not an actual timetable for support.

How would you go about using 'If I could…I would…' and 'Perfect Week' for your person?

Key things to think about….

- What would be important to establish before you start?
- How might the person best communicate/make decisions?
- How are you going to develop an effective conversation and report with the person?
- How are you going to adapt the tools to meet the person's individual needs and preferences?
- Are there any special considerations that need to be made to make the process safe for the person/keep it grounded?
- How are you going to record information in a way that is meaningful to the person?

Perfect Week Table

	Mornings	Afternoon	Evenings
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			

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Example 1

	Mornings	Afternoon	Evenings
Monday	Work	Work	
Tuesday	Wheelchair Rugby		
Wednesday	Work	Work	Pub
Thursday	Work	Work	Play another sport
Friday	Physio		Out with friends
Saturday		Watching live football	Out with friends
Sunday		Lunch or dinner with family	

Example 2

	Mornings	Afternoon	Evenings
Monday	Volunteering at a local Hospice		Church event
Tuesday	Volunteering for a local charity	Swimming	Walk dog
Wednesday	Walk dog	Coffee with friend	Date night
Thursday	Walk dog	Do something fun e.g. cinema/meal out	
Friday	Rest		Friends over for dinner
Saturday	Church group	Walk dog	Do some writing
Sunday	Church	Lunch with family	Walk/groom dog

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Tool 6

Shared Decision Making – Options Review Tool

Options available to me	Benefits of this option from my perspective are	Risks of this option from my perspective are
Option 1		
Option 2		
Option 3		

Options	My challenges with this option	My opportunities with this option
Option 1		
Option 2		
Option 3		

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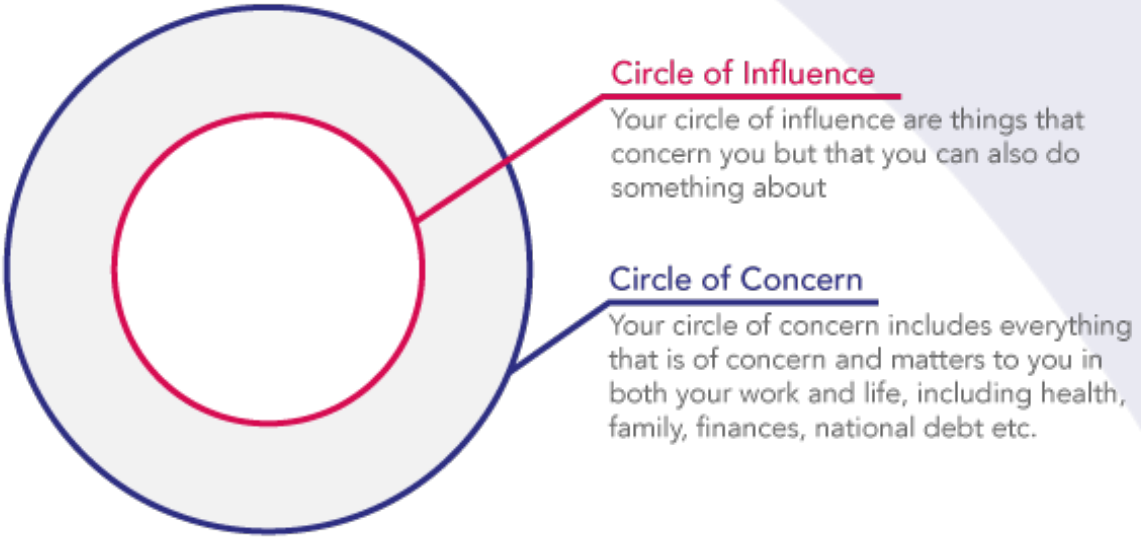
Tool 7

Circles of Influence and Concern

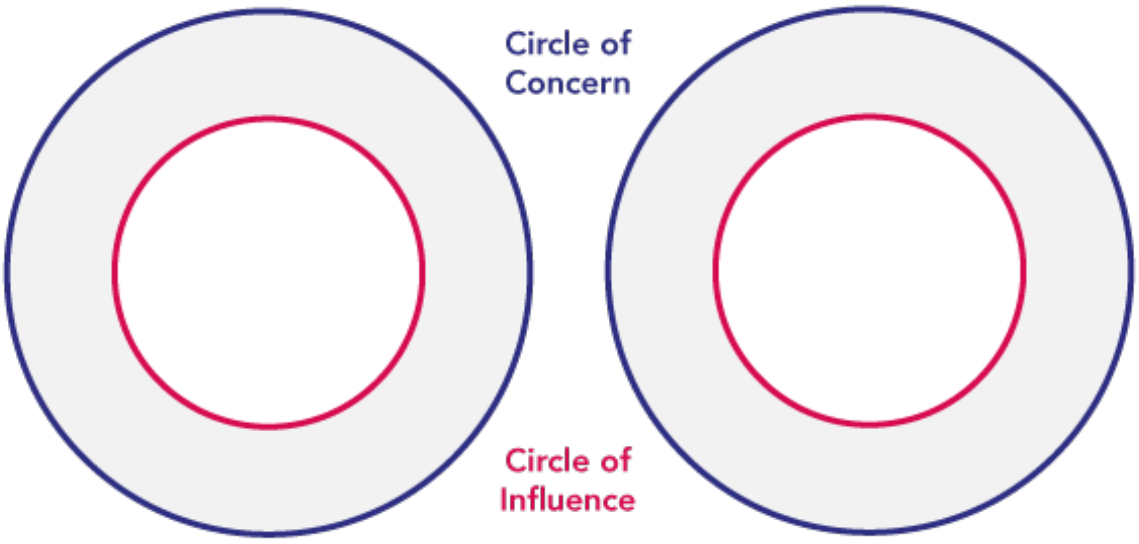
This tool can be a very impactful way of helping explore ownership and responsibility. *Ask the person you are speaking with "What do you want to be different?"; and* ask them to name the things that are impacting upon them and plot where they are situated.

Using the two circles below, work with them to plot what they say, either in their circle of influence or circle of concern, before asking what issue is most important to them. You can then use a coaching-style conversation to explore what they could do about the issues and what steps they will commit to as a result, to take them towards their desired outcome.

Circle of Influence & Concern



Now plot areas of your life where you have concerns & influence



My Circle of Influence

Your Circle of Influence

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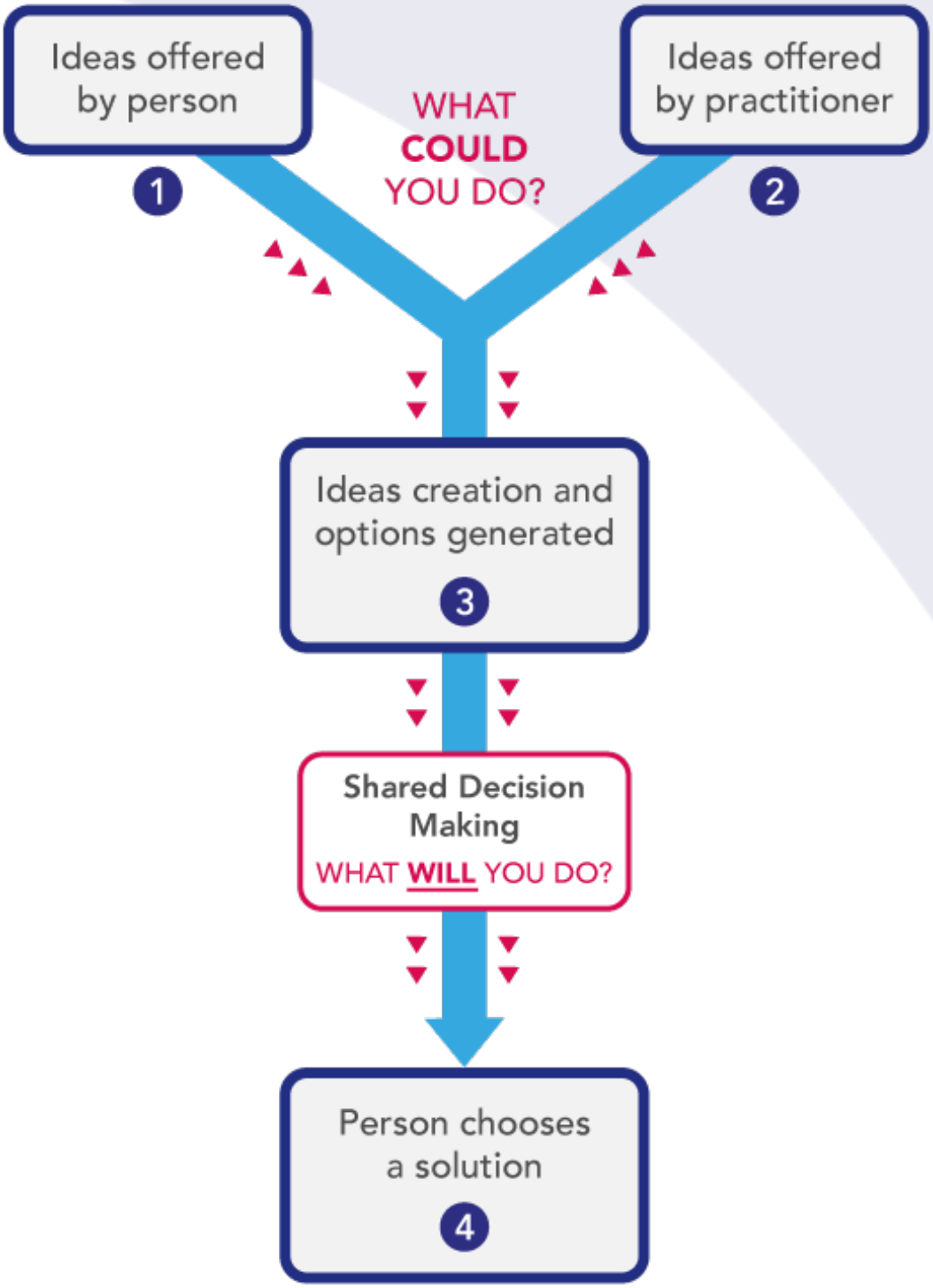
Tool 8

Solution Finding Model



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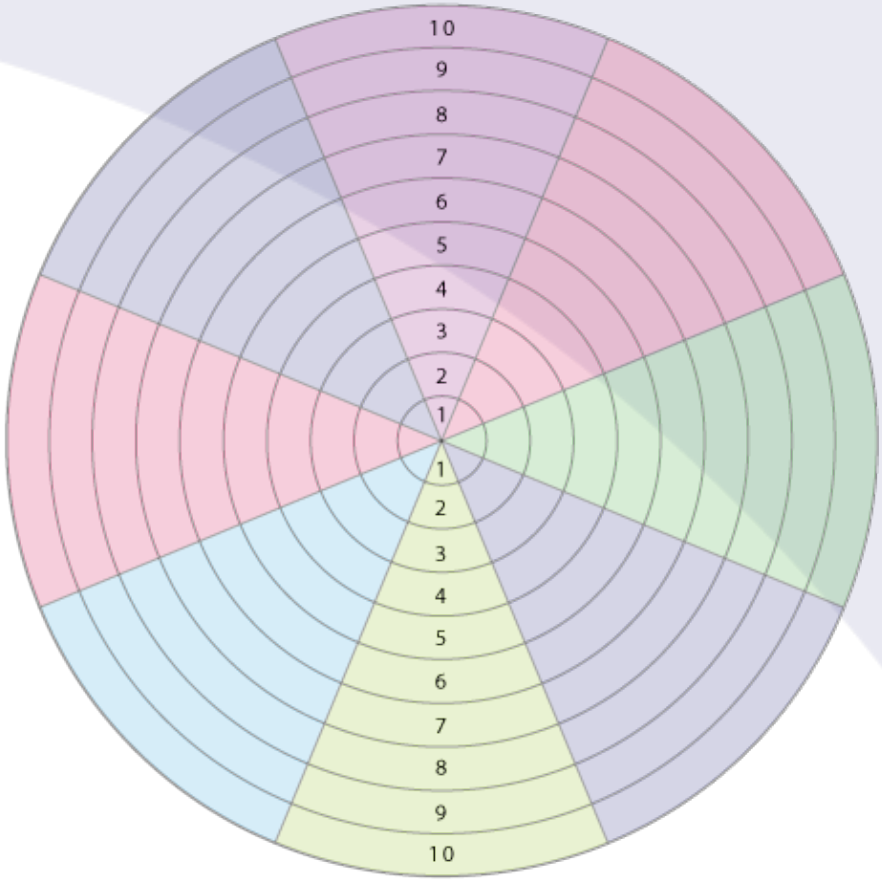
Tool 9

The Health Wheel Tool [BLANK]



Think about 8 key areas of your life and add them to the Health Wheel above and give yourself a score based on how happy you are with each, with 0 being not happy at all and 10 being very happy. Then shade in each segment up to your chosen score, to create a picture of your current wellbeing.

Reflections on areas I want to change

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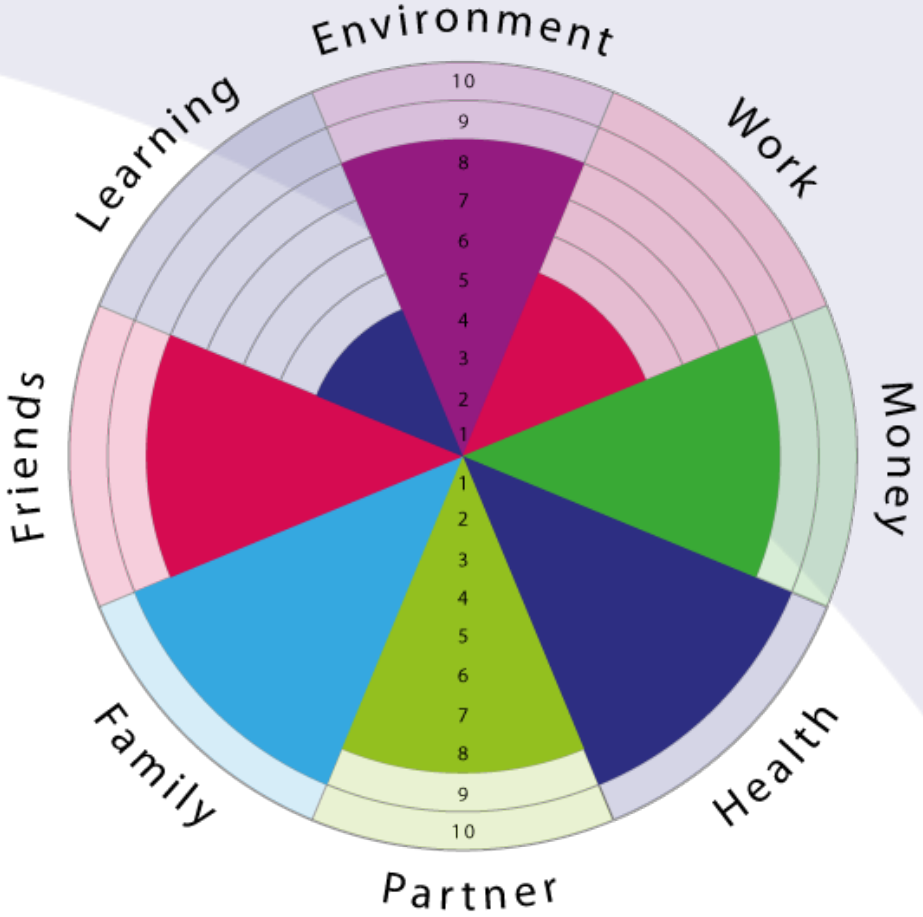
Tool 9: Example

The Health Wheel Tool



Think about each of the 8 key areas of your life detailed in the Health Wheel above and give yourself a score based on how happy you are with each, with 0 being not happy at all and 10 being very happy. Then shade in each segment up to your chosen score, to create a picture of your current wellbeing.

Reflections on areas I want to change

This is an example of a Health Wheel that has been completed, whereby the individual has shaded in their scores out of 10 on each of the respective areas in their life, giving an easy to understand and visual representation of their current thoughts.

Here it is evident that this individual seems to be very happy with their Health & Family and happy with their Environment, Money, Partner and Friends.

However there does appear to be some unhappiness around Learning and Work that would be useful to explore further with the individual.

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Further Learning

If you would like to extend your learning and knowledge further, we recommend the following books:

- Coaching for Performance by Sir John Whitmore
- Coaching with the Brain in Mind by David Rock & Linda Paige, Ph.D.
- Coaching Skills by Jenny Rogers
- Conversational Intelligence by Judith Glaser
- Developing Mental Toughness by Graham Jones and Adrian Moorhouse
- Drive: the Surprising Truth About What Motivates Us by Dan Pink
- Mindful Compassion by Professor Paul Gilbert
- Neuroscience for coaches by Amy Brann
- Rewire Your Anxious Brain: How to Use the Neuroscience of Fear to End Anxiety, Panic, and Worry by Catherine M. Pittman and Elizabeth M Karle
- Time to Think: Listening to Ignite the Mind by Nancy Kline
- The 7 Habits of Highly Effective People by Stephen Covey
- The Chimp Paradox. The Mind Management Programme for Confidence, Success and Happiness by Stephen Peters
- The Upward Spiral by Alex Korb

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