

Summary of the Life Care Planning Summit 2002

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Introduction

Were YOU there? Did YOU see the group of the industry's leading life care planning professionals assembled in one conference hall? Did YOU hear the volumes of creative and thought-provoking discussions? The Life Care Planning Summit 2002 was held on May 19, 2002 in Oak Brook, Illinois with 120 professionals in attendance. This one-day Summit focused on the areas of Standards of Practice and Certification and followed the Life Care Planning Advanced Practice Program also held in Oak Brook on May 18, 2002. Chaired by Susan Riddick-Grisham and sponsored by Intelicus/University of Florida, the Summit drew support and participation from key professional organizations in life care planning including the International Academy of Life Care Planners (IALCP), International Association of Rehabilitation Professionals (IARP), American Association of Legal Nurse Consultants (AALNC) and Commission on Health Care Certification, CHCC (formerly known as Commission on Disability Examiner Certification, CDEC). The Summit also was supported by academic institutions including Georgia State University and Virginia Commonwealth University. Other highly qualified and experienced life care planners donated their time and dedication to the Summit as organizers, speakers, facilitators and recorders for the roundtable discussions.

Process

As a natural outgrowth of the Life Care Planning Summit held in 2000, this year's Summit was structured in a similar way. An introductory session was held in the morning for the entire group which included presentations on Standards of Practice by Karen Preston (look for her article elsewhere in this Journal), Ethics by Roger Weed, Changes in the Industry by Paul Deutsch and Certification by Bob May. The group was then assembled into 10 smaller groups, with an attempt to have representation within each group of the various backgrounds, education, training, experience and knowledge of the life care planning professionals who were present. Following a modified nominal group technique, the 10 groups then rotated through roundtable discussions on five (5) topic areas of focus thought to be integral to the current practice of life care planning:

- 1) Scope of Practice/Specialty Skills
- 2) Life Care Plan Methodology and Functions

- 3) Ethics
- 4) Professional Development and
- 5) The Future of Life Care Planning.

Every participant rotated through the five roundtables and each roundtable had approximately 30-40 minutes to discuss the specific topic and generate comments from the participants. The small size of the roundtables enabled individual participation from each member. Groups were then asked to prioritize the most important issues pertaining to the topic area. Consensus among the roundtables was then determined based on the priority order of the issues. Because there were two (2) roundtable groups for each of the five (5) topic areas, at the completion of all roundtable discussions, facilitators within each topic area culled the data, combined results and determined those areas in which consensus was reached or a high level of agreement was obtained within the particular topic. This information was then presented back to the entire group in the afternoon session so participants could learn of the consensus or priority areas which grew out of the roundtable discussions.

If this sounds like a monumental task to accomplish in an eight hour day, it was. But true to our profession, participants were intellectually and physically "charged up" for the task and fully participated in the process. The Summit consisted of representation from a wide variety of life care planning professionals both from the US and Canada who hold an incredible amount of years of wisdom and experience. Where else can you find the true pioneers of life care planning, Paul Deutsch and Roger Weed, in the same room along with the movers and shakers and future leaders in the industry? The "electricity" and intellectual discussion generated by the participants and facilitated by the roundtable facilitators was outstanding!

Historical Basis

A summary of the Life Care Planning Summit 2002 would not be complete without summarizing the historical base that has led to the present day Summit. Technically, Summit 2002 comprised the third Life Care Planning Summit that has been held. The first Summit, held in December 1997, was at the direction and conception of Roger Weed and included representatives from Intelicus/University of Florida, CHCC (then the Commission on Disability Examiner Certification) and IALCP (then the American Academy of Nurse Life Care Planners). This small group gathered for a one day Summit in Atlanta, Georgia to discuss the status of life care planning (in 1997). Outcomes identified by the group included promotion of the practice of life care planning as well as utilization of qualified life care planners to provide life care planning and related services, exploration of a common definition of life care plan, education regarding alternate uses for life care plans, identification of common concerns and variances among life care planning professionals/organizations, establishment of a hierarchy of needs, development of acceptable research methodologies consistent with Federal Rule of Evidence 702 (remember Daubert was just a "baby" to the life care planning industry in 1997), collaboration among professionals and organizations that represent life care planners, and initiation of action items to achieve the outcomes. Common concerns expressed by the group included the meaning of certification, development of standards of practice, ethical practice, and potential fragmentation of life care planners within the life care planning industry. Consensus was reached at the first Summit that life care planning is transdisciplinary and therefore there was a need to work on national collaboration, even to the extent of forming a separate, single organization for life care planners. Educational programs on a national level

to further promote collaboration as well as include advanced practice sessions also was considered a consensus area by participants in the first Summit.

Now advance forward to the Life Care Planning Summit 2000 held in Dallas, Texas. Summit 2000 most likely is remembered by many life care planners and, in fact, was attended by many of the Summit 2002 participants. Chaired by Roger Weed, this Summit also was sponsored by Intelicus/University of Florida in conjunction with IALCP, IARP and CDEC and had many of the same participating experts. The modified nominal group technique was employed with this group for the first time and roundtable discussions were held in similar manner to the Summit 2002 roundtables. The five (5) focus areas identified in 2000 included:

- 1) Professional Preparation
- 2) Basic Tenets and Procedures for Completing Life Care Plans
- 3) Ethics
- 4) Reliability and Validity of the Life Care Plan and
- 5) Information Dissemination.

With 100 participants in attendance (full capacity), consensus was achieved in many of the priority areas and on issues where consensus was unable to be achieved, a majority view was established. Another outcome of Summit 2000 was development of a bibliography of appropriate and peer-reviewed life care planning and related publications. Participants at the Summit were asked to contribute applicable references for the bibliography and a list of 148 references was developed. That list continues to grow and, at the time of the Summit 2002, had approximately 177 references (Weed, R., Berens, D., Deutsch, P. 2002). For a full summary of the Life Care Planning Summit 2000, the reader is referred to the Life Care Planning Summit 2000 Proceedings, Weed, R. & Berens, D. (Eds.), (2001), printed by Elliott & Fitzpatrick, Inc. (800/843-4977).

Conclusion

An historical review of the Life Care Planning Summits is helpful in identifying similarities over time and areas where there has been accomplishment and progression of the practice as well as areas of continued development. It is obvious that a lot has been accomplished as a result of the Summits and that life care planning professionals who have participated in any or all of the Summits can be proud of the contributions they have made that, in turn, have helped shape our practice and determined the direction for our industry based on the collective input. It is interesting to note that one common theme or thread throughout all of the Summits has been the need for collaboration among professionals and organizations that represent life care planners. Another common area of focus has been continued promotion and enforcement of ethical practice among life care planners and consistency within our industry on the methodology employed by life care planners in developing life care plans. The Summits have been a proactive attempt by leaders in life care planning to establish that consistency and collaboration among the practice of life care planning.

Promoted as a way to provide a forum for discussion among life care planners to "have a significant voice in the development of life care planning education, research and practice," the Life Care Planning Summit 2002 offered more than that to its participants. Summit 2002 allowed participants to discuss issues important to them and relevant to the practice of life care planning, including standards of practice, ethics and certification, among other topic areas.

Although final results from the Summit 2002 roundtable discussions have not yet been fully analyzed, plans are to have a draft of the results (i.e., consensus areas or majority view areas among the five topic areas) reviewed by participants of the Summit and opportunity given for comment. Once comments are received from the participants, a second draft will be sent to appropriate organizations for review and comment. The ultimate outcome is a concise document of published proceedings from the Life Care Planning Summit 2002. It is anticipated that the proceedings will further define our practice and pave the path for future directions within life care planning. Now don't YOU want to be a part of that?

References

Weed, R. & Berens, D. (Eds.). (2001). *Life Care Planning Summit 2000 Proceedings*. Sponsored by Intelicus, International Academy of Life Care Planners, International Association of Rehabilitation Professionals and the Commission on Disability Examiner Certification, April 12, 2000, Dallas, TX. Athens, GA: Elliott & Fitzpatrick, Inc.

Weed, R., Berens, D. & Deutsch, P. (2002). Bibliography of life care planning and related publications, *Journal of Life Care Planning*, 1(1), 73-84.

Biography

Debbie Berens, MS, CRC, CCM, CLCP, is a rehabilitation consultant and life care planner in private practice in Atlanta, Georgia. Her experience as a vocational rehabilitation counselor and case manager in the areas of workers' compensation, short and long-term disability, Social Security, Veterans Affairs job placement, general liability and personal injury forms the foundation for her consulting practice that specializes in assessment, research and development of life care/future care plans for children and adults with catastrophic injuries and disabilities. Debbie is a part-time instructor in the graduate Rehabilitation Counseling program at Georgia State University as well as adjunct faculty with the Intelicus nationwide training program in Life Care Planning for Advanced Catastrophic Case Management. In July 2001, she completed a five year term as Commissioner on the national Commission on Rehabilitation Counselor Certification (CRCC) where she was actively involved as a member of the Ethics Committee responsible for revising the Professional Code of Ethics for Rehabilitation Counselors and also served as chair of the Standards and Credentials Committee. She is active in both state and national rehabilitation organizations and is a past-president of the Professional Rehabilitation Specialists of Georgia, the state chapter of the International Association of Rehabilitation Professionals (IARP). She has participated both as an organizer and attendee in all three of the Life Care Planning Summits and has contributed over the years to writings and publications in the field of rehabilitation and life care planning. She is a current member of the National Coalition of Life Care Planners Task Force as well as serves on the Editorial Board of the *Journal of Life Care Planning*.
