



Values Card Sort

Personal Goals and Values

Earning CEUs



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 - Pharmacy Tech Certification Board
 - Case Manager Certification by the Commission of Case Manager Certification
 - American Board of Social Work Certification and American Psychological Association Certification and National Board for Certified Counselors Certification

Meet Our Faculty

Melissa Bruhl, DO, CMD



Melissa Bruhl is a primary care physician who has spent the past four years in Home Based Primary Care and Hospice Service. She has over 16 years' experience in long term care with a focus on caring for patients and families navigating the complexities of dementia. She has a passion for listening to the individual regarding goals for health and partnering with the patient to provide

whole-person centered care. In her free time, she enjoys outdoor activities such as camping and hiking with her spouse and three children.

Amy Fynmore



Amy is a Certified Workforce Development Professional. She has 10 years experience in social services serving individuals and families with complex behavioral and social needs in the fields of family welfare, workforce development, and housing / homeless services. Amy is passionate about closing the equity gap through strategic collaboration, innovation, and evaluation. Amy has led and supported clinical innovation projects to improve

complex care delivery and developed programs to enhance occupational training access and post-secondary attainment for individuals with disabilities. Amy is based in Phoenix, Arizona where she enjoys volunteering, spending time with family, and riding her Peloton.

Check Point

Today's presentation includes material that may elicit complex feelings for some individuals. Please sign out at any time the material being presented causes you discomfort or distress.

This informational training is an overview of current research and its applicability to current practices. Always defer to your business unit's specific policies. When in doubt, always check with your supervisor.

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Learning Objectives

At the end of this course you will be able to:

- Define the Personal Values Card Sort.
- Identify why knowing values and having goals is important.
- Define how to administer the Values Card Sort.
- Discuss how to use the information gathered from the Personal Values Card Sort.

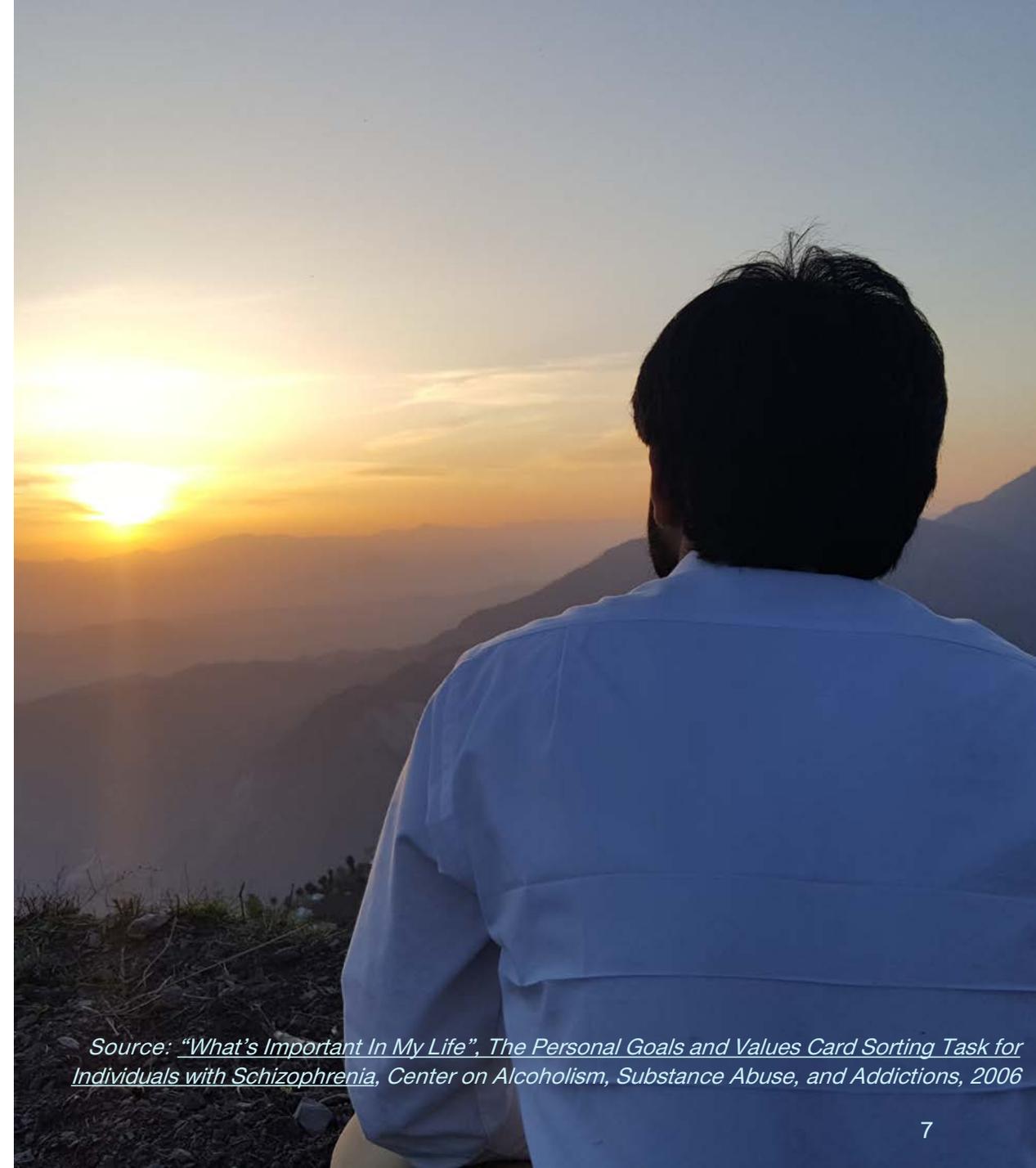
What are Personal Values?

- Complex set of standards to guide lives
- Influence conduct
- Values influence decisions and actions
- Represent areas of personal importance
- Values add to goals in positive manner



The Values Card Sort

- Originally published in 2001; Adapted in 2006
- Deck of value cards separated into degrees of importance
- Introduced as an exercise to describe and understand what is most important in life



Source: "What's Important In My Life", The Personal Goals and Values Card Sorting Task for Individuals with Schizophrenia, Center on Alcoholism, Substance Abuse, and Addictions, 2006

Connection to Care Philosophy and Practice

- Motivational Interviewing
- Person-Centered Care
- Authentic Health Relationships
- Encourage Self-reflection



Importance of the Values and the Values Card Sort

- Explore core values
- Identify what is most important in one's life
- Employ reflective listening
- Strengthen relationship
- Guide engagement and intervention strategies
- May help highlight discrepancies between goals and behaviors



Journal Prompt

You will be asked to complete the Values Card Sort to build empathy for the experience.

The Values Card Sort Activity

- Can be completed in person or over the phone
- Can be started, stopped, and revisited over time
- Conversation around activity is valuable
- Ensure activity is appropriate for individual and that they're ready



Facilitate the Values Card Sort

- Explain activity
- Establish three piles
- Sort values cards into categories
- Resort those in most important category
- Engage in discussion around top values



Language Used to Discuss Values and the Values Card Sort

The Values Card Sort activity may bring up difficult and painful experiences

- Use the cards to ask open ended questions about why the person picked a card
- Through the process you may find the person better able to define what is important to them
- Resistance may come up when a value is compared to current conflicting behaviors
- Does not need to be completed in one setting – can be re-visited over time

Conversations about Values

- Remain person-centered
- Use curiosity
- There are no right or wrong answers
- Show empathy, support, and compassion
- Build the relationship





**Case
Presentation
of Values &
the Values
Card Sort**

How to Use Information from Values Card Sort

- There are no prescriptive actions based on results
- Focus on individual's goals and wishes; use most important values moving forward as reference
- Connect desires to health outcomes
- Begin conversations about finding strength
- Use information from Values Card Sort to inform ongoing care plan

Meet Rico

- On disability for decades
- Spent most of his time watching television
- Wanted to earn money
- Found meaning through work



Personal Next Steps

1. Complete the Values Card Sort activity for yourself
2. Use your Personal Journal to reflect on that experience
3. Review requirements of your role – and identify a standing milestone to discuss goals and facilitate a Values Card Sort



Journal Prompt

Reflect on the experience
of completing the
Values Card Sort for yourself.

Key Takeaways

1

Values are a complex set of standards that guide our lives and influence how we conduct ourselves in various ways

2

The activity creates an opportunity for the person to share important parts of his life with you and allows you to better understand him

3

Engage in a discussion around the selected value cards to inform a discussion on goals

4

Employ Motivational Interviewing techniques and use open-ended questions to find individual connections



Additional Resources

Values Card Sort Activity

- [Values Card Sort](#) (Formatted to be printed on card stock)
- [Values Card Sorting Task for Individuals with Schizophrenia](#) (Formatted to be printed on card stock)

UNM CASAA, <https://casaa.unm.edu/inst/Personal%20Values%20Card%20Sort%202.pdf>

UNM CASAA, <https://casaa.unm.edu/inst/Values%20Card%20Sorting%20Task%20for%20Individuals%20with%20Schizophrenia.pdf>

Language Guide for Values and the Values Card Sort

What language is used when discussing personal goals and values?

- When administering the Values Card Sort activity, keep in mind the values on the cards may bring up some difficult and possibly painful experiences and memories. Some sample dialogue is presented to facilitate the discussions.
- Use the cards to ask open ended questions about why the member picked a card. This becomes the basis of a motivational interview technique.
- Through the process you may find the member better able to define what is important to them.
- There may be times when resistance comes up when a value is compared to current conflicting behaviors – that is normal and anticipated, roll with the resistance. This activity can just be the starting point.
- The conversation does not need to be completed in one setting, but rather can be re-visited over time.

Learning Circle Guide: Values Card Sort

Directions: In your self-defined Learning Circles, a peer facilitator leads a discussion and/or role-play leveraging the talking points below to process the training content from the most recent learning event. Please reflect on all learning topics to date as you discuss today's content including personal life experiences and how these topics might be woven into your day to day work with UHG and ultimately impact those we serve.

- Based on what you learned in this session, how do you see using the Values Card Sort with those you serve?
- What might be challenging about differentiating between values and goals? How could you tie the concepts together as it relates to healthcare for someone with low health literacy?
- Imagine using the Values Card Sort as a teambuilding activity- how might this be helpful to working relationships?
- Discuss the values statements on the Values Card Sort activity to see how you might engage a person who is having difficulty identifying their most important values.
- If time permits and volunteers are willing, engage in a role-play where you practice the Values Card Sort activity. Focus on:
 - Explanation of the activity
 - Establishing the three piles
 - Engaging in discussion about the whole process