

## Development of the Individual Budget Under California's Self-Determination Program

After the Self-Determination Program (SDP) participant holds a person-centered plan, the IPP team determines the individual budget to ensure the budget assists the participant to achieve the outcomes set forth in his or her IPP and ensures his or her health and safety.

The IPP team determines the initial and any revised individual budget for the participant using the following method:

For a participant who is a current consumer of the regional center, his or her individual budget will be the total amount of the most recently available 12 months of purchase of service expenditures for the participant.

The IPP can make an adjustment to the individual budget if both of the following occur:

1. The IPP team determines that an adjustment to this amount is necessary due to a change in the participant's circumstances, needs, or resources that would result in an increase or decrease in purchase of service expenditures, OR the IPP team identifies prior needs or resources that were unaddressed in the IPP, which would have resulted in an increase or decrease in purchase of service expenditures.
2. The regional center certifies on the individual budget document that regional center expenditures for the individual budget, including any adjustment, would have occurred regardless of the individual's participation in the Self-Determination Program.

The individual budget shall not be increased to include the cost of the independent facilitator and financial management services. The cost of the independent facilitator and the financial management services must be paid out of the participant's individual budget.

For a participant who is either newly eligible for regional center services or who does not have 12 months of purchase service expenditures, his or her individual budget shall be calculated as follows:

1. The IPP team shall identify the services and supports needed by the participant and available resources.
2. The regional center will calculate the cost of providing the services and supports to be purchased by the regional center by using the average cost paid by the regional center for each service or support unless the regional center determines that the consumer has a unique need that requires a

higher or lower cost. The regional center will certify on the individual budget document that this amount would have been expended using regional center purchase of service funds regardless of the individual's participation in the Self-Determination Program.

The individual budget shall not be increased to include the cost of the independent facilitator and financial management services. The cost of the independent facilitator and the financial management services must be paid out of the participant's individual budget.

The amount of the individual budget will be available to the participant each year for the purchase of program services and supports. An individual budget should be calculated no more than once in a 12-month period, unless revised to reflect a change in circumstances, needs, or resources of the participant.

The individual budget is assigned uniform budget categories developed by DDS and distributed according to the timing of the anticipated expenditures in the IPP and in a manner that ensures that the participant has the financial resources to implement his or her IPP throughout the year.

Annually, participants may transfer up to 10% of the funds originally distributed to any budget category to another budget category or categories. Transfers greater than 10% of the original amount allocated to any budget category may be made upon the approval of the regional center or the participant's IPP team.

Each year when the IPP team convenes, the team should review whether there are any circumstances or needs that require a change to the annual individual budget. Based on that review, the IPP team will calculate a new individual budget.

The law also states that most restrictions put into place in 2009 for cost control measures do not apply to SDP participants, including:

- Camping services and associated travel expenses.
- Social recreation activities, I would delete the except part—I think currently folks can get social rec as part of a day program, so it isn't really a change here
- Educational services for children three to 17, inclusive, years of age.
- Nonmedical therapies, including, but not limited to, specialized recreation, art, dance, and music.
- Limitations on the number of hours of in-home respite services.

If a consumer disagrees with the individual budget amount determined at their IPP, they have the same due process rights that all consumers have.