

# Self-Determination Program Orientation **Train-the-Trainer**

2024



# HOUSEKEEPING



Interpretación en español: haga clic en el globo blanco en la parte inferior de la pantalla con la etiqueta "Interpretation." Luego haga clic en "Spanish" y seleccione "Mute original audio."



ASL interpreters have been "Spotlighted" and live closed captioning is active



This meeting is being recorded

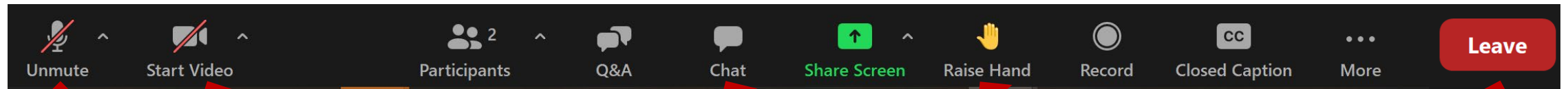


Materials are available at: [SDP website: Orientation Tab](#)



Submit written comment via email to: [SDP@dds.ca.gov](mailto:SDP@dds.ca.gov)

# ZOOM TIPS



Unmute mic only when it's your turn to speak



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All attendees can type questions/comments in the Q&A

Chat is available for presenters only; send chats to "Everyone"

Presenters can raise their hand when wanting to speak

Leave the webinar at the end of the meeting



- For attendees, your video and microphone will not be available
- You will only see/hear presenters on the screen



- Features will vary based on the version of Zoom and device you are using
- Some Zoom features are not available for telephone-only participants

Today you  
will learn  
about

- Regional Center Services
- The Self-Determination Program
- Person-Centered Planning
- Individual Budget
- Spending Plan
- Arranging Services
- Enrolling
- Resources & Next Steps

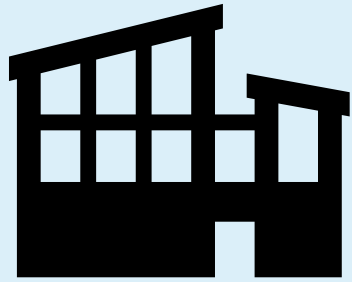
# Regional Center Services



# Regional Center Services



- The Department of Developmental Services manages coordination and delivery of services for people with intellectual/developmental disabilities
- This is done through the regional center system created by the Lanterman Act
- There are 21 non-profit regional centers across California
- The regional centers decide who is eligible for services, provides a Service Coordinator, and pays for some services



## Regional Center Service Options

These options are based on the Lanterman Act values of choice, individual decision-making through an Individual Program Plan (IPP) and promoting independence and community inclusion.





Traditional  
Vended  
Services

## The Traditional Services Option

- You have an IPP created that pinpoints your goals and how to meet those goals
- Services from the regional center are *usually* provided through vended service providers
- Service Coordinators help you find your service providers and set up your services.
- Regional centers pay the service providers for your services



**Participant-Directed Services** is a part of the Traditional Service Option.

## Non-vendored services

- You can hire, schedule and supervise your staff
- You will work with a vendored Financial Management Services Provider to help you pay your staff, and comply with employment laws

## Vendored services

- Located by and paid for by the regional center



Participant-Directed Services

## Participant-Directed Services, continued



Participant-Directed Services

**You** and/or a family member can find a provider for services like

- Community-based training service
- Daycare
- Nursing
- Respite
- Transportation services
- Personal Assistance
- Independent living services
- Supported Employment

Non-vendored services would be paid for through the Financial Management

Services Provider



## The Self-Determination Program Option

- A voluntary, alternative way to receive services and supports
- The program can provide you and your family with more freedom, control, and responsibility in choosing services and supports to meet your IPP goals
- You will have people to help you, like your Financial Management Services Provider and your regional center

# Regional Center Services

**The Self-Determination Program** is unique from the other options.

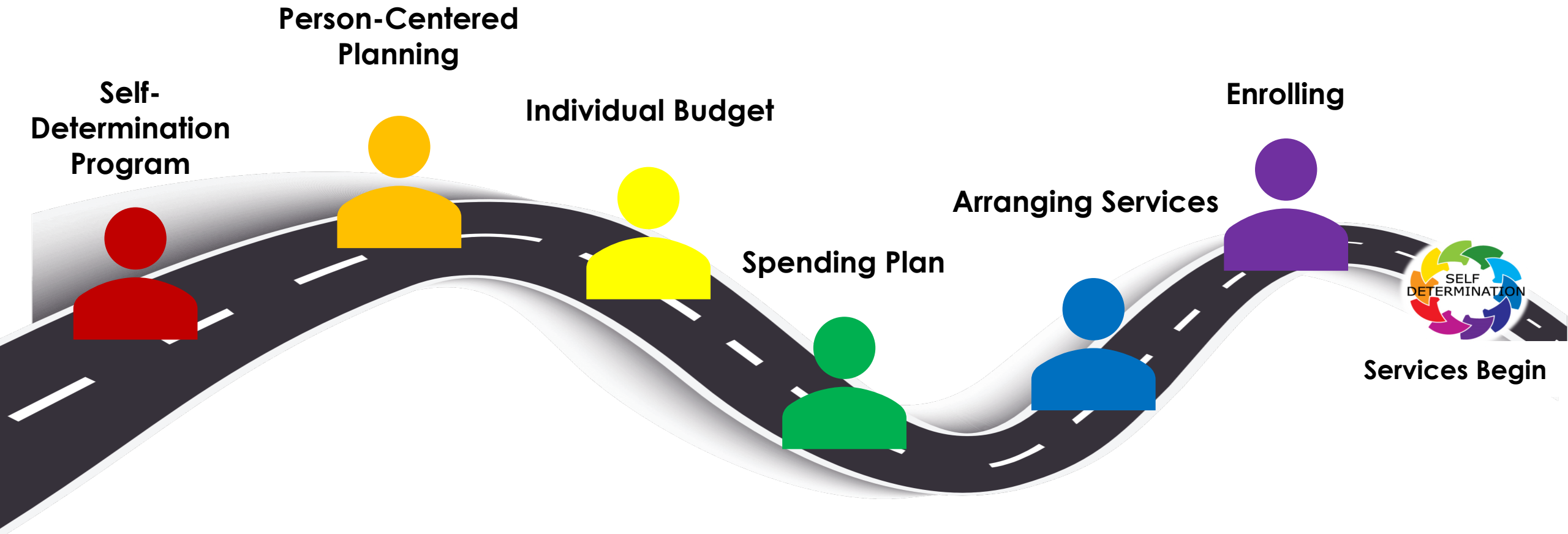
- **You** and your IPP team develop your budget, spending plan, and arrange service providers
- **You** can use your budget to purchase services and goods from qualified service providers, individuals, or businesses even if they are not vendored with the regional center
- **Your** services and supports must be eligible for federal financial participation
- **You** must use a vendored Financial Management Services Provider to assist you

# Things To Think About

What do I like best about each of the different options that the regional centers use to offer services?

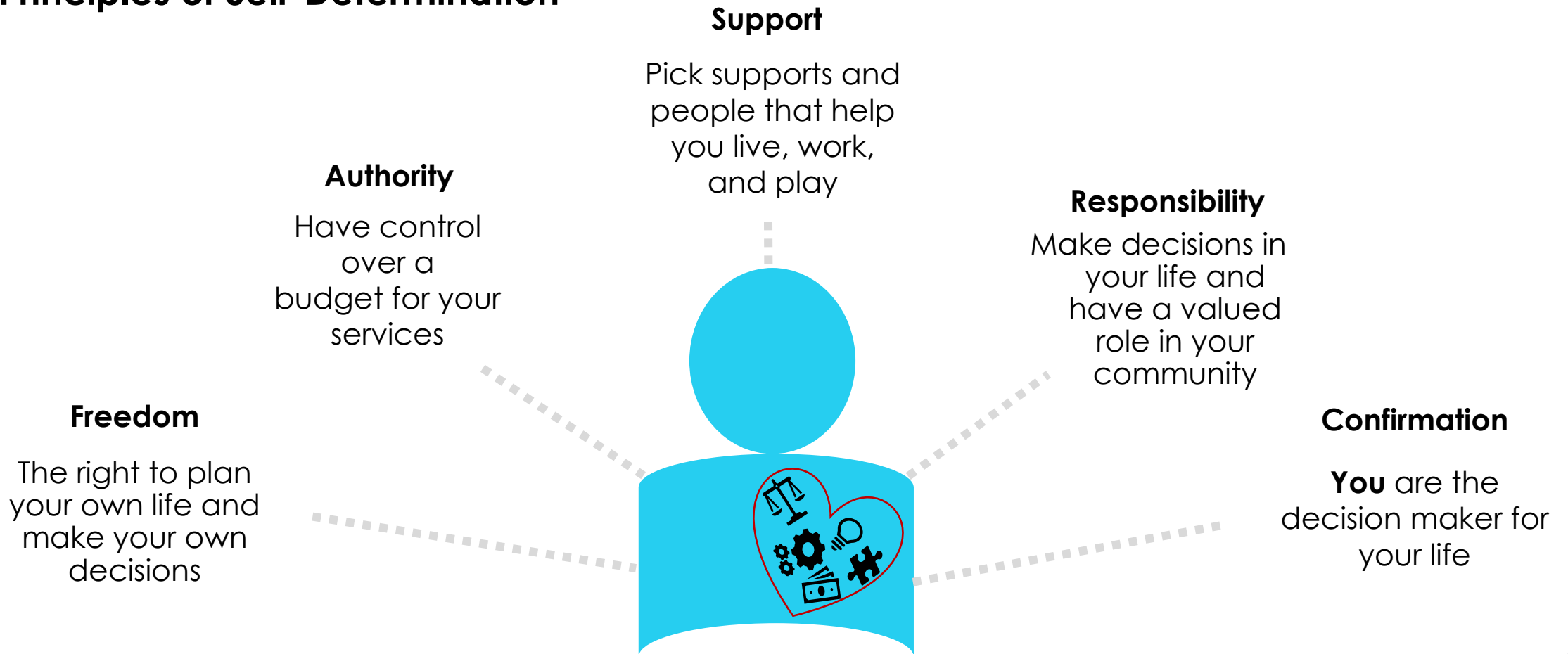


# Self-Determination Program Roadmap



# The Self-Determination Program

## 5 Principles of Self-Determination



# The Self-Determination Program

## You Can Participate If You

- ✓ Qualify to receive regional center services through the Lanterman Act
- ✓ Live at home in the community, or in a group home
- ✓ Live in a long-term healthcare facility or state-operated facility, and want to use the Self-Determination Program to help plan your move to the community
- ✓ Agree to the responsibilities in the Self-Determination Program statute



# Self-Determination Program Responsibilities

If You Choose  
To Participate,  
You Agree To

- ✓ Attend this Self-Determination Program orientation
- ✓ Use services needed to meet goals in your IPP
- ✓ Use SDP services **only** when generic services are **not available**
- ✓ Apply for Medi-Cal services, if you can
- ✓ Control your services and supports in your annual budget
- ✓ Work with a Financial Management Services Provider

# The Self-Determination Program

You can choose people to help and support your **pre-enrollment** to the Self-Determination Program.

## **Required Supports**

- Regional center staff and your Service Coordinator
- A vendored Financial Management Services Provider

## **Optional Supports**

- Natural supports, family members, and friends
- A person-centered planner and transition supports paid for by the regional center

# The Self-Determination Program

## Natural Supports Are

People in your life who **know you best**, like friends or family. You can choose to have your natural supports help you, but you **don't have to**.

- A favorite teacher or a person who has worked with you for a long time, that you **trust**
- Someone who can **help you** locate services, and supports specific for you, or volunteer to provide them
- They can help you make your person-centered plan, IPP, individual budget, and spending plan

# The Self-Determination Program

The Self-Determination Program is supported by DDS and regional centers

<b>Department of Developmental Services (DDS)</b>	<ul style="list-style-type: none"><li>• Implements and oversees the program</li><li>• Reports program data</li><li>• Supports long-term sustainability of the program</li></ul>
<b>Regional Centers</b>	<ul style="list-style-type: none"><li>• Implements the program in their area</li><li>• Monitors the program</li><li>• Reports program data</li><li>• Contracts with local consumer, or family-run organizations, and works with the local volunteer advisory committee (LVAC)</li><li>• Makes information available</li><li>• Identifies and reduces concerns and barriers to enrollment</li></ul>

# The Self-Determination Program

There are two  
advisory  
committees

<b>Local Volunteer Advisory Committee (LVAC)</b>	<ul style="list-style-type: none"><li>• Reviews and checks the program's progress for their regional center</li><li>• Works with the regional center and the Department to make the program better</li><li>• Works with regional centers to prioritize implementation funding</li><li>• Makes information available</li></ul>
<b>Statewide Self- Determination Advisory Committee (SSDAC)</b>	<ul style="list-style-type: none"><li>• Made up of the chairs of the 21 regional center LVACs</li><li>• Collects information from the LVAC, the community, regional centers and the Department</li><li>• Recommends ways to make the statewide program better</li><li>• Has information on available services and supports, and develops training materials</li></ul>

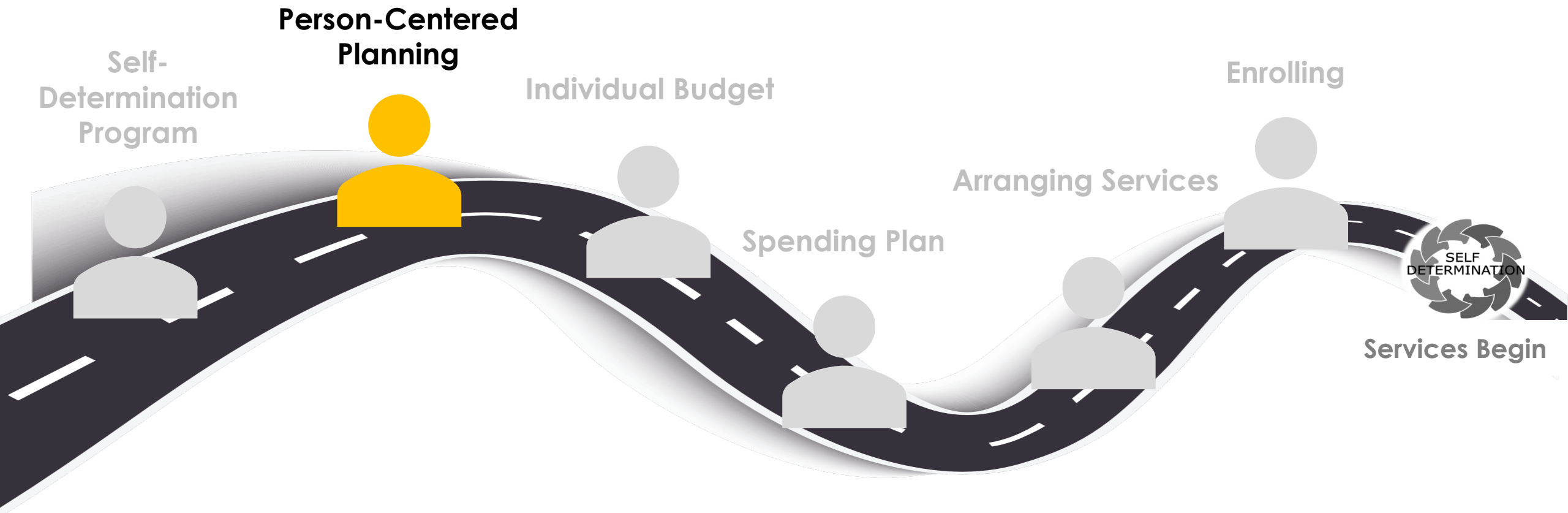
# Things To Think About

Would the Self-Determination Program option work best for me?

Who can help me think about this decision?



# Self-Determination Program Roadmap



# Person-Centered Planning

**Person-centered planning** helps you focus on what you want and need in your life. Your IPP lists what your goals are, and how your services and supports can help you reach them.

**In the Self-Determination Program** you have the option to write a person-centered plan to help create your IPP.

- The regional center can pay for someone to help you make your initial person-centered plan, which will help create your IPP.



The person-centered plan is about you

**The person-centered plan** describes what you want your life to be like in the future, so you can work towards your goals.

- ✓ It is based on your strengths, capabilities, preferences, lifestyle, and culture
- ✓ It identifies the services and supports that help you reach your goals
- ✓ It will help you create your IPP

# Person-Centered Planning

You can develop a written person-centered plan with your team.

## You Should

- Lead the development of your person-centered plan
- Hire someone to help you
- Meet with your planning team

## Your Team Should

- Attend your person-centered planning team meetings to support you
- Listen to your hopes, dreams and needs to develop your person-centered plan
- Use your person-centered plan to help you create your IPP

# Person-Centered Planning

**Pre-Enrollment Transition Support Provider(s)** may be hired to help you with your planning. They may be vendored or non-vendored.

- ✓To support you with person-centered planning and updating your IPP
- ✓To help you identify your **strengths**
- ✓To help get the information you need to make **choices**
- ✓To help identify your immediate and long-term **needs** and **goals**

**Service Coordinators** can also help you during this transition



**Pre-Enrollment  
Transition Support  
Providers  
can be vendored  
or non-vendored**

# Things To Think About

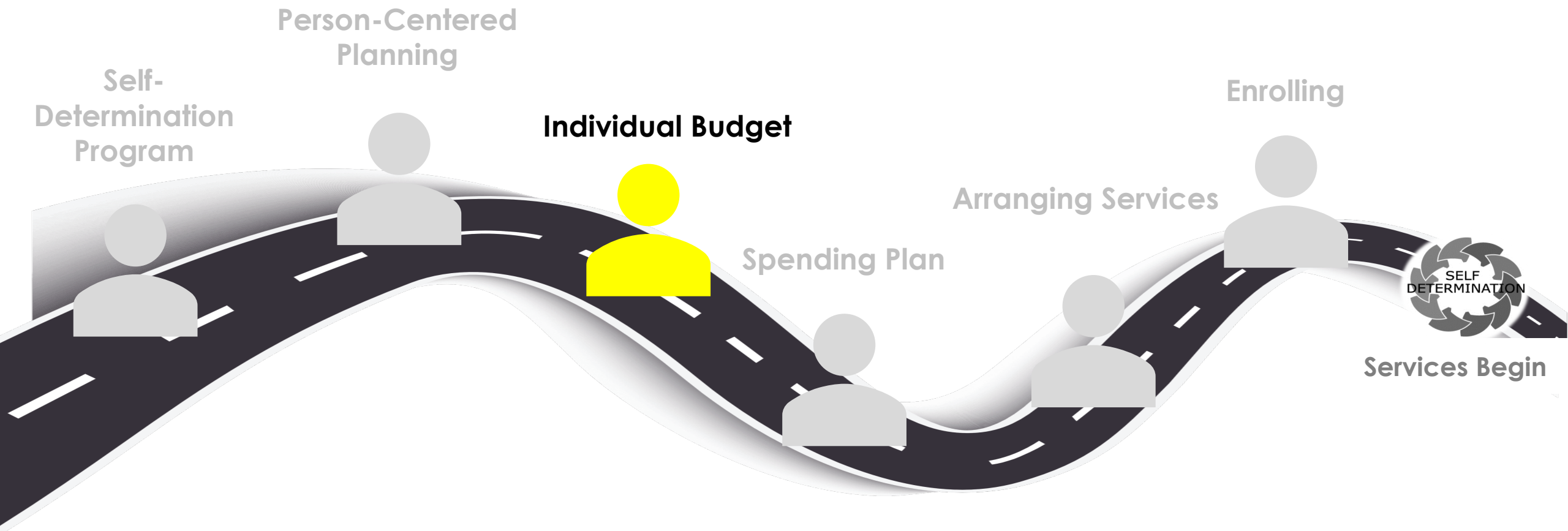
Do I want a person-centered plan?

Who would I want to help with my person-centered plan?

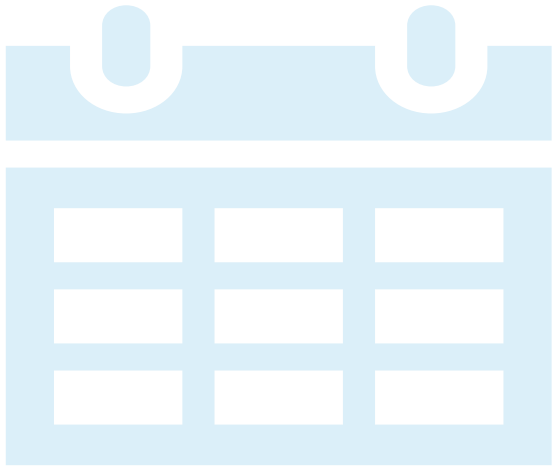
What goals would I want in my person-centered plan in the next year?



# Self-Determination Program Roadmap



# Individual Budget



**The individual budget** is the amount of money you can spend on services.

Your budget will start with the amount of money the regional center spent on your services in the past 12 months.

Your regional center will provide you with the information you'll need to start developing your budget.

The IPP team may  
adjust your  
budget up or  
down

Reasons to adjust the budget are

- If services in your IPP were not used
- If there were unmet needs in your IPP
- Changes in your circumstances/needs
- Changes in resources available to you

You will have  
help with  
your budget

## **Service Coordinators and other regional center staff**

- Help **you** get the information you need to make choices
- Help **you** at your IPP meeting
- Helps develop your budget with the IPP team
- Certifies your final budget
- Monitors your budget and lets you know of any concerns



# Things To Think About

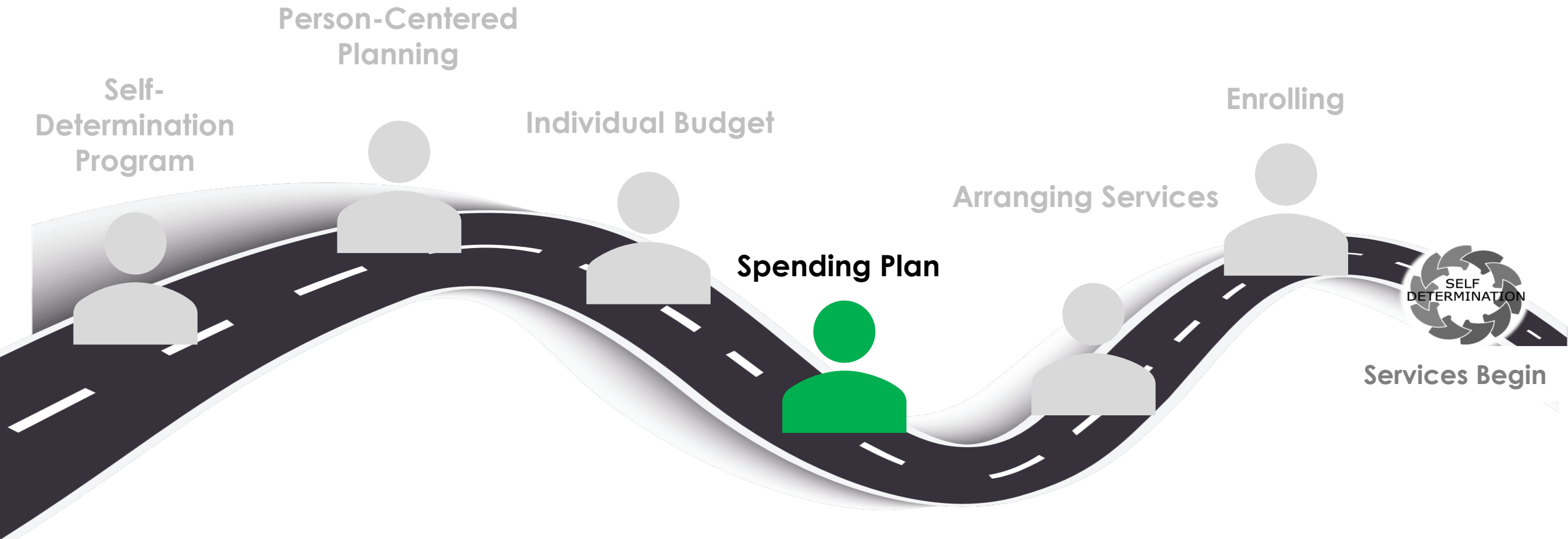
Are there tools that can help my team as I develop my individual budget?

Who can help me understand how all the dollar amounts were determined?

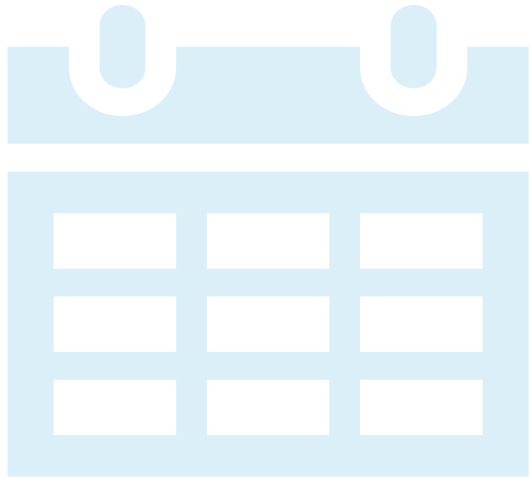
What are the services and supports I need to implement my IPP?



# Self-Determination Program Roadmap



# Spending Plan



**The spending plan** identifies the services and items **you** need to implement your IPP.

Your spending plan includes the cost of each service or item that will be purchased with your budget funds.

A spending plan is developed by you and your IPP team.

# Spending Plan



Things to  
remember  
about your  
spending plan

- ✓ Your spending plan can only pay for services and supports that are in your IPP
- ✓ Your spending plan cannot pay for transition services
- ✓ The regional center is still the payer of last resort
- ✓ Your spending plan does **not** need to identify specific providers of services
- ✓ The amount of the spending plan cannot be higher than your budget

You can get  
help with your  
spending plan

## **The Regional Center or Transition Support Providers may**

- Tell you how much services typically cost
- Identify places or people who provide services you're interested in
- Find generic services you don't have to pay for

## **Financial Management Services Providers**

- Tells you the minimum wage in your area
- Tells you the cost of taxes, insurances and benefits

# Spending Plan

## **Before you are in the program**

The regional center may pay qualified people or agencies that can help you develop your spending plan.

## **After you are in the program**

You will need to pay for this help from your individual budget. Set money aside in your spending plan for the help you think you need next year, such as the help of an Independent Facilitator.

# Independent Facilitator

An Independent Facilitator is a person **you** select to help you once you have enrolled in Self-Determination Program.

An Independent Facilitator **may**

- Support **you** to make informed choices about your individual budget
- Help **you** find and organize services that match your individual program plan (IPP) goals
- Assist **you** in identifying short and long-term needs
- May participate on the IPP team and help you advocate for yourself



Having an Independent Facilitator is **optional**



Before you are done writing your spending plan, your regional center will need to review it to **make sure**

- All services are **eligible** for federal financial participation
- Generic services are used first, unless unavailable
- The spending plan helps you reach your IPP goals



# Things To Think About

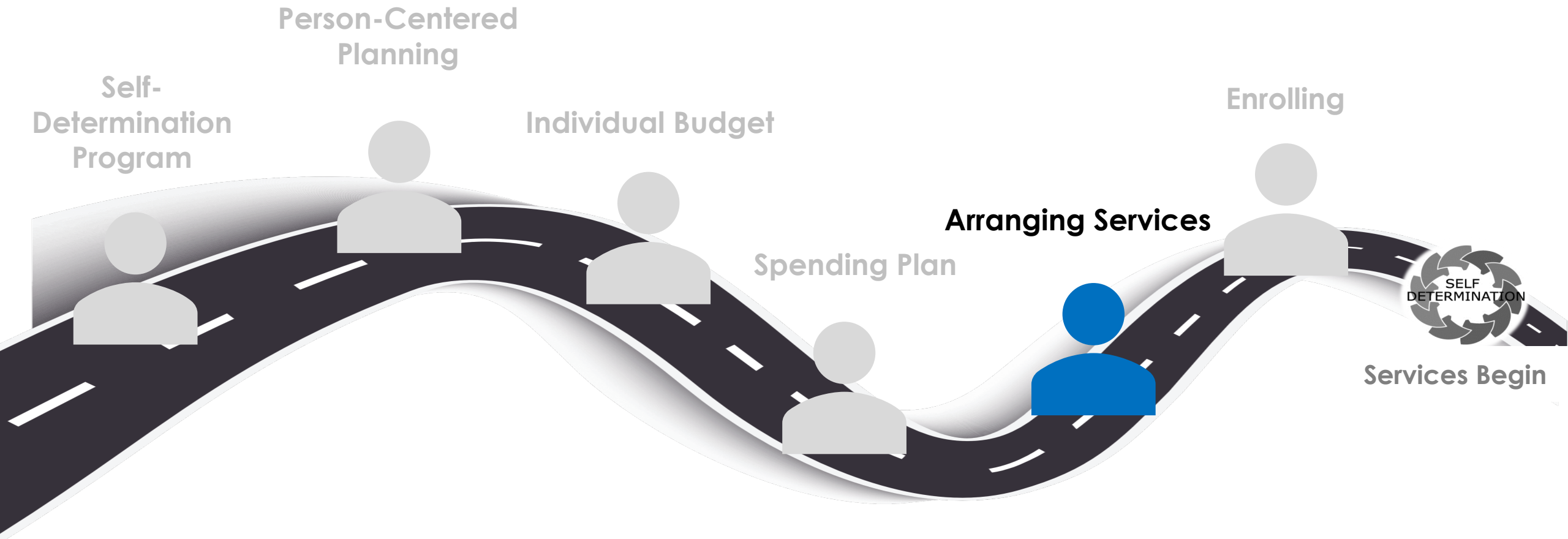
What if my spending plan costs start going over my budget amount? What does the team do then?

Is there a tool for the spending plan or how do I set up a spending plan?

How do I keep track of what I have spent?



# Self-Determination Program Roadmap



# Arranging Services

**You** can make choices about who can work with you to provide your services.

## Anyone qualified to provide services

- People you trust
- People who know you best
- Family and friends
- Teachers, therapists, coaches
- Employer

## Those who *cannot* be paid to provide services

- A parent of a minor child
- A person who cannot pass a background check for personal care services, unless there is an exemption

# Arranging Services

The services you choose must include the following



Be a  
federally  
allowable  
service



Providers  
must be  
qualified



Support  
choice  
and  
inclusion



May be  
vendored  
or non-  
vendored

## The Home and Community- Based Services (HCBS) Final Rule

Your services *must* also follow the HCBS Final Rule

- This means that your services are provided inclusively in the community
- The service is in a place or provided in a way that doesn't group people by disability or service

# Arranging Services

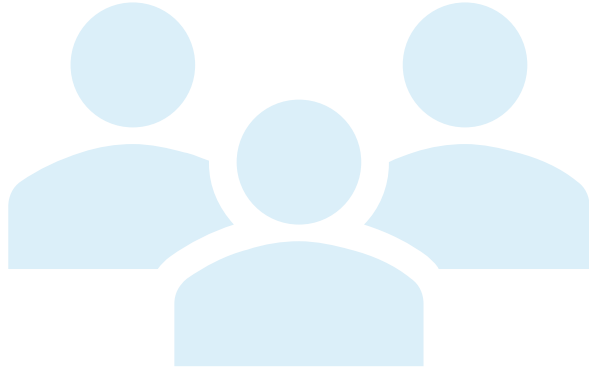
If the service is **only** for people with developmental disabilities, you will need to check if the service is eligible

- ✓ Ask your regional center if the service is eligible
- ✓ **You** and your provider can work together to complete an assessment
- ✓ **You** and your Financial Management Services provider can review the assessment together
- ✓ Each year at your IPP meeting, you and your team will check that the service is still eligible

Services may be eligible under the Home and Community Based Services (HCBS) assessment and can include camps, art classes, or theater groups



# Arranging Services



You can get help to find services and supports.

Examples of some people who may help you include

- Natural Supports
- Service Coordinator
- Pre-Enrollment Transition Support Provider
- Independent Facilitator
- Family Resource Center

## A Financial Management Services Provider

- ✓ Helps you check if your staff and providers are qualified
- ✓ Completes your staff's background check when required, and helps your staff complete necessary paperwork
- ✓ Makes sure employment laws are followed
- ✓ Works with the regional center to make sure your services are authorized
- ✓ Pays for the services and supports throughout the entire year from your spending plan
- ✓ Helps you with changes to your service providers, if needed



# Arranging Services

When you  
arrange  
services, double  
check that you

- ✓ Purchase services and goods **needed** to carry out your IPP
- ✓ Purchase services and goods that **meet** state and federal requirements
- ✓ Develop qualifications **and** a staff agreement if you hired staff
- ✓ Have staff that passed their background checks help with **personal assistance**
- ✓ Prepare to **supervise staff** and sign their timesheets
- ✓ Prepare to **terminate staff** who do not follow your IPP, employment rules or who cannot pass a background check

# Things To Think About

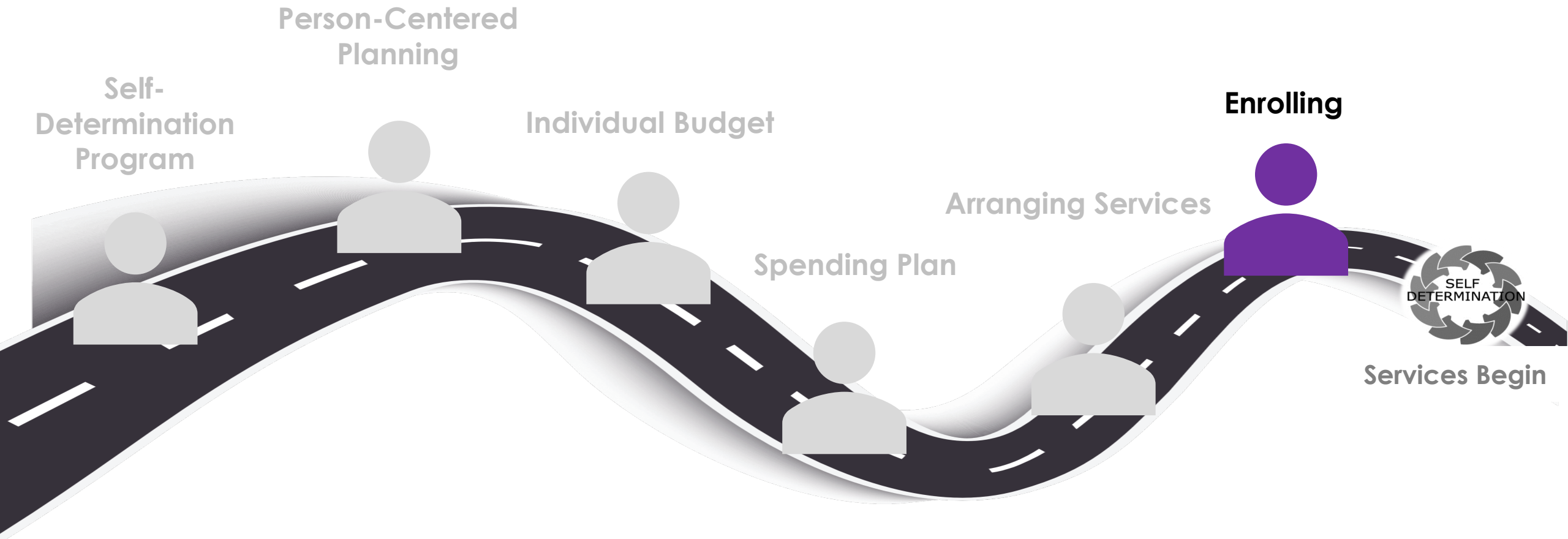
Who can help me find staff to provide my services and supports?

Do I have someone in my life who I trust and who knows me well who would want to work with me?

Are there creative ways I think my services or supports can be provided?



# Self-Determination Program Roadmap



# Enrolling in the Self-Determination Program

## ✓ **Attend Orientation – here you are!**

- ❑ Tell your Service Coordinator that you want to enroll in the Self-Determination Program
- ❑ Decide who you want to help you as you move into the Self-Determination Program
- ❑ Develop your **Person-Centered Plan** if you want one
- ❑ Meet with your IPP Team to update your IPP and develop your **individual budget**
- ❑ Create your **Spending Plan** and start the process for selecting staff and vendors to support you
- ❑ Work with your **Financial Management Services** provider and IPP team to finalize your Spending Plan
- ❑ Make sure that services have been authorized in the regional center financial systems
- ❑ Begin receiving services through the Self-Determination Program

# Enrolling in the Self-Determination Program

If you choose to get services through the Self-Determination Program after this orientation

**There are supports available** to help you and your family with person-centered planning and the transition before you enroll in the program.

- Service Coordinators
- Other regional center staff
- Pre-Enrollment Transition Support providers
- Local Volunteer Advisory Committee

# Enrolling in the Self-Determination Program

## Pre-Enrollment Transition Support is available

After orientation and until you are enrolled in the Self-Determination Program, your Service Coordinator or a Pre-Enrollment Transition Support provider can help you get transition support like

- **Coaching**, training, and assistance to enroll
- **Coordinating** how services and supports are provided
- Learning how to **manage** the individual budget and spending plan
- Working with the regional center to support a **smooth transition**

# Enrolling in the Self-Determination Program

Financial Management Services are also available **after** orientation and **before** you enroll

The Financial Management Services Provider **must be** vendored to help Self-Determination Program participants

- ✓ Educate and coach you on requirements to be an employer
- ✓ Check the HCBS Final Rule requirements
- ✓ Review and help you adjust the spending plan to include minimum wage, taxes and insurances
- ✓ Discuss the spending plan, services and the e-Billing system with the regional center
- ✓ Support a smooth transition

# Enrolling in the Self-Determination Program

Before services can start, there are specific things that need to happen.

- ✓ You and your team develop an IPP, budget and spending plan
- ✓ The Financial Management Services Provider completes all the required paperwork with your staff
- ✓ The Financial Management Services Provider enters your information, your staff information and the spending plan into their system
- ✓ The regional center enters your services into the regional center system



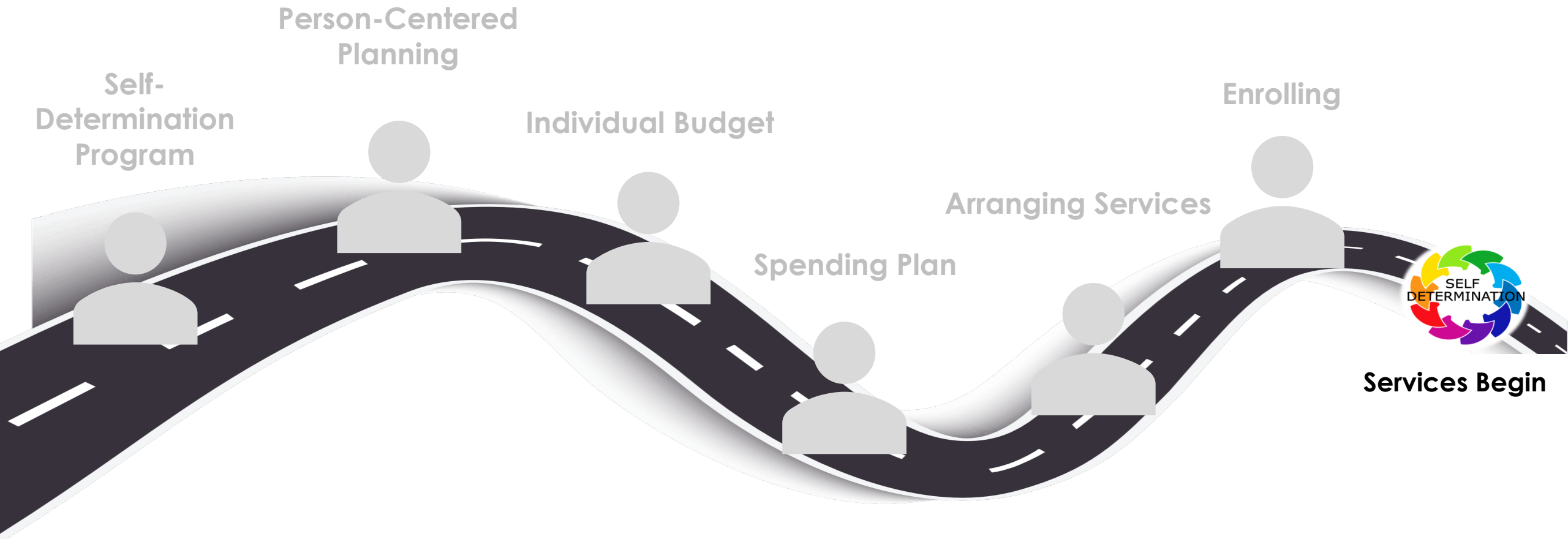
# Things To Think About

How often should I ask my Service Coordinator and my Financial Management Services Provider how things are going?

Who can help me talk with my staff about when we can start if enrolling is taking longer than we thought?



# Self-Determination Program Roadmap





Everything is  
going as  
planned

**You** will be responsible to

- Follow the Self-Determination Program agreements
- Tell your team if you have changes, concerns, or questions
- Review your monthly budget statements
- Manage staff, if you have them
- Get help to understand and apply labor laws, if needed



Everything is  
going as  
planned

## **The Financial Management Services Provider will**

- Receive and pay bills for your services
- Keep a separate account for your funds
- Help you manage paperwork like timesheets and other records
- Give you and the regional center a budget statement every month
- Help you make sure that you have enough money to pay for your services for the year



Everything is  
going as  
planned

**The regional center** will meet with you to see how things are going

- Are your services still meeting your needs?
- Check-in about your health, safety and well-being
- Identify and respond to any allegations of abuse and neglect



Everything is  
not going as  
planned

There are people to **help you** if something isn't going right. Tell your team, Service Coordinator, or Independent Facilitator if you need help with changes, such as

- If your staff quits and you don't have any supports
- If you need a personal care attendant and don't have one
- If you have an emergency that changes your service needs



Everything is  
not going as  
planned

You have the same rights in the Self-Determination Program as you would in other service options. These rights include

- The same rights as other regional center consumers like the right to dignity, and to make choices
- The right to an IPP meeting to discuss changes to your service, and to request an appeal if you disagree
- The right to be free from harm, abuse, or neglect



Everything is  
not going as  
planned

There are different contacts that can **help you**, including

- Your Service Coordinator
- The Self-Determination Program Ombudsperson at DDS
- Clients' Rights Advocate
- Make a complaint to your RC Director if you believe your rights are being violated (4731 complaint)
- Make an appeal to DDS if you are not satisfied with the response from your RC Director

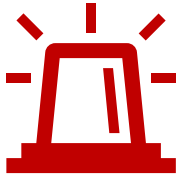




Everything is  
not going as  
planned

You, your team, and everyone who works with you needs to be aware of the signs of abuse or neglect

- Learn about different types of abuse
- Learn how to know abuse is happening
- Learn where and how to report abuse



What to do if you think abuse is happening to you or someone you know

**Tell someone** you trust so they can make sure you are safe

- Family
- Friends
- People from your school
- People at work
- Independent Facilitator

**Report** to the appropriate people

- Your Service Coordinator
- Your regional center
- Adult protective services
- Child protective services
- Local law enforcement
- Medical professionals

# Services Begin

**The Ombudsperson** can assist you and your family to take part in the program by

- Providing information to regional center clients and their families
- Helping with solutions to disagreements
- Investigating complaints regarding implementation of the program
- Recommending strategies for change to the department and the legislature
- Compiling and reports data to the legislature

Self-Determination Ombudsperson information and contacts can be found online at [office-of-the-self-determination-ombudsperson](#)

# Things To Think About

Do I know who to talk to when I'm having trouble with my staff or my services?

Do I know who to talk to if I move or if my needs change?

Who could I tell if I see or feel the signs of abuse?



# Resources & Next Steps



## After orientation

- ✓ **Review** the handouts
- ✓ **Ask** questions
- ✓ **Decide** if the Self-Determination Program is for you
- ✓ **Tell** your Service Coordinator
- ✓ **Review** the additional training materials
- ✓ **Use** the transition supports and other resources available to you

Good luck on your Self-Determination Program journey!

Thank you for attending!

