



NOTICE/AGENDA

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES STATEWIDE SELF-DETERMINATION ADVISORY COMMITTEE MEETING

This meeting is being held via teleconference within the meaning of Government Code Section [11123.2](#). Members may be physically present at one or more teleconference locations. There may be members of the public body who are participating in today’s meeting that were granted a reasonable accommodation per the Americans with Disabilities Act (ADA). Accessible formats of all agenda and materials can be found online at www.scdd.ca.gov

TELECONFERENCE LOCATION

SCDD HQ OFFICE
3831 North Freeway Blvd., #125
Sacramento, CA 95834

JOIN BY TELECONFERENCE:

Call-In Number: (888) 475-4499
Meeting ID: 893 8768 7083

JOIN VIA ZOOM:

Meeting ID:
Password:

<https://bit.ly/SSDAC-FEB-2025>
893 8768 7083
881391

DATE: February 19, 2025

TIME: 11:00 AM – 5:00 PM

COMMITTEE CO-CHAIRS:

Nestor Nieves & Rick Wood

Item 1. CALL TO ORDER

Item 2. ESTABLISH QUORUM

Item 3. WELCOME AND INTRODUCTIONS

Item 4. APPROVAL OF JULY 2024 MINUTES 

| | | |
|-----------------|--|---------|
| Item 5. | CO-CHAIR REPORT TO SSDAC <i>Presented by Rick Wood & Nestor Nieves</i> | Page 10 |
| Item 6. | DDS AND OMBUDSPERSON UPDATES <i>Invited: Katie Dempsey & Katie Hornberger</i> | Page 11 |
| Item 7. | SCDD UPDATES <i>Presented by Aaron Carruthers</i> | Page 31 |
| Item 8. | CORO PROJECT: BUDGET PROCESS MAP <i>Presented by SSDAC Workgroup</i> | Page 32 |
| Item 9. | SSDAC TOWNHALL REPORT <i>Presented by Rick Wood & Nestor Nieves</i> | Page 33 |
| Item 10. | 2025 GOALS AND PRIORITIES <i>Presented by Rick Wood & Nestor Nieves</i> | Page 49 |
| Item 11. | PUBLIC COMMENTS <i>This item is for members of the public to provide comments and/or present information to this body on matters not listed on the agenda. There will be up to 20 minutes allocated to hear from the public with each person allotted up to 3 minutes to comment.</i> <i>Additionally, there will be up to 10 minutes allocated to hear from the public on each agenda item, with each person allotted up to 1 minute to comment.</i> | Page 52 |
| Item 12. | NEXT MEETING & ADJOURNMENT Possible in-person meeting the week of June 23 rd -27 th (in Southern California) | |

Accessibility:

Pursuant to Government Code Sections 11123.1 and 11125(f), individuals with disabilities who require accessible alternative formats of the agenda and related meeting materials and/or auxiliary aids/services to participate in this meeting should contact (916) 263-7919. Requests must be received by 5 business days prior to the meeting. *All times indicated and the order of business are approximate and subject to change.*

February 19, 2025

AGENDA ITEM 4.

ACTION ITEM

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

Approval of July 2024 Minutes

Committee members will review and approve the meeting minutes from the July 2024 meeting.

Action Recommended

Approve the July 10, 2024, meeting minutes.

Attachment

July 10, 2024, Meeting Minutes



DRAFT

**Statewide Self-Determination Advisory Committee
Meeting Minutes
July 10, 2024**

Attending Members

Charles Nutt (FNRC)
Chris Miller (RCRC)
David Forderer (SARC)
Debby Hight (NBRC)
Lori Walker (NLACRC)
Jan Opsvig (IRC)
Joyce Clark (SDRC)
Ken Parekh (GGRC)
Lisa Cooley (ACRC)
Michelle Smith (CVRC)
Pierre Landry (FDLRC)
Rick Wood (KRC)
Sherry Alvarez (SCLARC)
Vi Ibarra (RCEB)
Vivian David Nicolas (VMRC)
Youngeng Sun (ELARC)

Absent Members

Ellen Hunt (TCRC)
Betty Monterrey (SGPRC)
Rosalinda Garcia (HRC)
Regional Center of OC
Westside RC

Others Attending

Aaron Carruthers
Aminah Abdul-Hakim
Amethyst Ehrler
Ashley Willett
Beth Hurn
Christine Tolbert
Crystal Smith
Dena Hernandez
Diana Perez
Faviola Valencia
Gabriel Baca
Ibrahim Muttaqi
Jeanette Castro
Judy Mark
Julie LaRose
Juli Singley
Kristianna Moralls
Katie Dempsey
Katie Hornberger

Others Attending

Kavita Sreedhar
Liz Gongora
Lorena Gomez
Maria Lopez
Maribel Oliver
Miriam Erberich
Mozh Akbari
Naomi Hagel
Tumori Hill
Rachel Teefy
Regina Schekall
Renee Bauer
Rihana Ahmad
Robin Monroe
Robin Maitino-Erben
Roxy Ortiz
Sandra McElwee
Sandra Menendez
Sandra Van Scotter
Selvin Arevalo
Shelia Jordan Jones
Veronica Lopez

1. CALL TO ORDER

Co-Chair Rick Wood (FA) called the meeting to order at 11:05 A.M.

2. ESTABLISH QUORUM

A quorum was established.

3. WELCOME/INTRODUCTIONS

Members and others in attendance introduced themselves as indicated.

4. **APPROVAL OF THE APRIL 2024 MEETING MINUTES**

It was moved/seconded (Nutt [SA]/Landry [FA]) and carried to approve the April 2024 meeting minutes as presented (Motion passed by acclimation, with one abstention from Debby Hight).

5. **OFFICER ELECTIONS**

SCDD Executive Director Aaron Carruthers reviewed the SSDAC Co-Chair election process, reminding members that at the April SSDAC meeting, the committee discussed changing SSDAC policy to allow a Co-Chair to serve more than 2 consecutive terms. SSDAC Co-Chair Rick Wood presented his candidate statement, highlighting his accomplishments during his first two terms and his willingness to continue to serve. The floor was opened for any committee member to self-nominate. No other members wished to be considered.

It was moved/seconded (Nutt [SA]/Walker [FA]) and carried to change the SSDAC policy to allow a Co-Chair to serve more than two consecutive terms (Motion passed unanimously, see Page 1 for a list of members present).

Rick Wood was re-elected to serve as SSDAC Co-Chair (Vote was unanimous. See Page 1 for a list of members present).

6. **CO-CHAIR REPORT TO SSDAC**

Co-Chair Rick Wood reported on SSDAC-related activities that have taken place since the last meeting. Members were provided with the SSDAC FMS Recommendations and SSDAC Regional Center Training and Outreach Recommendations, which have been submitted to DDS. Members were informed about the May 16th DDS SDP Advisory Group meeting and that DDS grantee Qlarant has convened a workgroup and are seeking participants to provide input on training content and standards for Independent Facilitators.

Members and attendees were encouraged to visit the SSDAC Best Practices Platform to view updates and were informed that the SSDAC Workgroup are working with staff to put together a Resource Binder for new SSDAC Members. The presentation for the Co-Chair report can be found here:

https://scdd.ca.gov/wp-content/uploads/sites/33/2024/07/SSDAC-Co-Chair-Report.Final7_9.2024.pdf

PUBLIC COMMENT

Gabriel Baca – asked the committee if members of the public are able to join the SSDAC workgroup or if there are other ways for the public to participate in SSDAC meetings and was informed about public comment and invited to email chair Rick Wood. Mr. Baca stated that he is a relative of RC clients, is learning about the system and has ideas for improvement. He stated that he wants to support the system in coming up with ideas for changes and implementing them.

Tumboura Hill stated that he worked for the RC as program evaluator and that Service Coordinators, RCs, and PCS don't know enough about SDP. He stated that there is a need for education. He also expressed concern about frequently changing certification requirements for those who want to become Independent Facilitators.

Liz Gongora stated that she has been acting as an independent facilitator to assist her son with SDP and that she is experiencing delays in payment due to confusion about which service code she should be using for IF services.

7. DDS AND OMBUDSPERSON UPDATES

Kathleen Dempsey, DDS Self-Determination Program Branch Manager provided a presentation that covered current SDP enrollment data, recent DDS SDP directives, and upcoming areas of focus. DDS has released directives to clarify billing requirements and to provide guidance on Employer burden and other employment-related costs, updated FMS provider requirements, updated SANDIS reporting requirements, and implementation of regional center LVAC reporting. DDS areas of focus will include enhanced data collection to track enrollment and participation in SDP and establishing standards and certification processes for Financial Management Services and Independent Facilitators. Members were informed of upcoming DDS community meetings. The full presentation can be found here: <https://scdd.ca.gov/wp-content/uploads/sites/33/2024/07/DDS-Update.pdf>

Katie Hornberger, Acting SDP Ombudsperson provided a presentation of data from the Office of the Ombudsperson and informed the committee that recruitment is underway for the Ombudsperson position. The full presentation can be found here: <https://scdd.ca.gov/wp-content/uploads/sites/33/2024/07/SSDAC-Ombuds-Presentation.pdf>

Committee members encouraged DDS to continue to seek diverse stakeholder feedback regarding IF and FMS standards and asked for clarification regarding reimbursement for recreational services.

PUBLIC COMMENTS

Sandra Van Scotter stated that very few people have a smooth transition from year to year. She described her experience with delays and extensions during the process and requested that FMS providers treat their clients like customers by sending reminders and starting the transition process earlier.

Crystal Smith stated that she appreciates the SSDAC and the update from DDS and asked that a template for participant surveys be shared across regional centers to gather consistent information about why people aren't getting into the program.

Gabriel Baca stated that regional centers largely ignore SDP in favor of the traditional system and that regional center consumers should be supported in choosing which service delivery system works best for them. He stated that the Latino and African American populations are underserved in the SDP and that a lot of work remains to ensure that these communities are reached and have the support they need to transition into the program.

Juli Singley described difficulties with seeking reimbursement for recreational services due to requirements that service providers are vendors of the regional center. She stated that this requirement creates burdens for service providers and families and is taking opportunities away from her child.

Miriam Erberich asked that DDS provide clarification on its timeline for changes in the billing code for IF services.

Sandra Van Scotter stated that the calendar on the DDS website does not include SDP update meetings and asked if there is a plan to increase community involvement by increasing notification about the meetings.

8. SCDD UPDATES

SCDD Executive Director Aaron Carruthers provided an update on SCDD's SDP activities. This included current participant data and updates for SCDD led SDP Orientation trainings, which will continue under a renewed contract with DSS for an additional 3-5 years and will contain new and updated curriculum. Mr. Carruthers reported that SCDD staff will participate in a workgroup led by DDS grantee Qlarant to provide input on the standardization of IF services. Mr. Carruthers also reported that State Council supported legislation SB 1281, the Advancing Equity and Access in the Self-Determination Program Act, has been referred to the Appropriations Committee and placed on suspense file. The full SCDD Update presentation can be found here: <https://scdd.ca.gov/wp-content/uploads/sites/33/2024/07/ED.Report.SSDAC7.9.2024.pdf>

PUBLIC COMMENT

Judy Mark with Disability Voices United (DVU) thanked SCDD for supporting SB 1281 and informed members that DVU will continue to fight for the legislation and advocate for DDS to monitor solvency of FMS providers and simplify the spending plan process. She encouraged SSDAC members and attendees to contact their legislators, the governor's office, DDS and California's Health and Human Services Agency to advocate for the bill.

Gabriel Baca stated that she would like to see more effort to involve more non-English-speaking families into SDP, and more follow-up to these families after they attend orientation.

Karelia Barton stated that as an IF she has observed that Hispanic families are not able to obtain the information needed from the RC to transition to the SDP and feel that they are not a priority.

Vanessa Garcia asked if there was an option to identify as mixed-race or bi-racial in the SDP Orientation demographic data, stating that it may explain those who declined to answer that question.

Amethyst Ehrler asked what is being done to offer Spanish speaking IF trainings, stating that she completed an IF training and English was the only language available.

Karelia Barton stated that families are frustrated because they can't access basic SDP information from the RC, and that it seems like the RC does not want them to move from the traditional model to SDP.

Karelia Barton stated that there are not trainings available for IFs and that the RC has a lot of requirements that need to be met to become an IF.

9. FUTURE MEETING PLANNING

SSDAC Co-Chair Rick Wood informed members that because Local Advisory Committees have been administering grant funding for a variety of administrative, outreach and educational efforts, he would like SSDAC members to let him know if they have recommendations for past/current grantees to highlight at a future SSDAC meeting.

Committee members were asked to share topic ideas for the next SSDAC Townhall meeting. Committee members discussed and submitted their ideas through the chat. These responses will be considered by the SSDAC workgroup as they plan for the December 2024 Townhall.

10. PUBLIC COMMENTS

Amethyst Ehrler asked for and was provided with instructions on how to be added to the DDS SDP distribution list. To be added to the list, email your request to SDP@dds.ca.gov.

Cindy Cox encouraged the committee to address barriers to finding IFs at the next SSDAC meeting. Several meeting attendees entered messages in the Zoom chat in support of this, citing the cost of IF services and the misconceptions about the roles of IFs.

Jon Francis stated that antiquated IT systems, payroll IT systems and portals are causing tremendous frustration not only for basic payment of bills but delays/mistakes on pay checks for direct staff, and IFs are given limiting access to make corrections. He stated that it takes too much correspondence to clear matters up. He stated that RC's have little or no tracking and accountability for where an individual is in the process of transitioning. He thanked the committee for their efforts and passion for making SDP sharp, responsive, trustworthy, and functional.

11. ADJOURNMENT

The meeting was adjourned at 3:59 P.M.

February 19, 2025

**AGENDA ITEM 5.
INFORMATIONAL ITEM**

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

Co-Chair Report to SSDAC

Co-Chairs Rick Wood and Nestor Nieves will provide an update on SSDAC-related activities that have taken place since the July 2024 meeting. Updates may include the SSDAC Member Reports, Workgroup activities, and more.

Attachment(s)

None.

Handout(s)

February 2025 SSDAC Member Reports

There may be additional handouts on the day of the meeting.

February 19, 2025

**AGENDA ITEM 6.
INFORMATIONAL ITEM**

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

DDS and Ombudsperson Update

DDS will provide members with an update on SDP-related activities including any relevant updates on recent directives, data, and more.

In addition, the Ombudsperson will give an update on trends, including and overview of the information provided in the attached report and any new updates on the state of the FMS' serving clients.

Attachments

Offices of the Ombudsperson Report 2025

Handouts

There may be additional handouts on the day of the meeting

OFFICES OF THE OMBUDSPERSON REPORT

ASSISTING PEOPLE SERVED UNDER THE LANTERMAN ACT AND IN THE SELF-DETERMINATION PROGRAM

January 2025



DEPARTMENT OF DEVELOPMENTAL SERVICES



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OFFICES OF THE OMBUDSPERSON

ABOUT THE OFFICES

The Office of the Self-Determination Program Ombudsperson (SDP Office) is an independent entity within the Department of Developmental Services (the Department) that helps individuals served by the regional center and their families fully participate in the Self-Determination Program (SDP) by:

- Providing information and assistance
- Facilitating solutions to disagreements

The SDP Office helps individuals served by the regional center and families understand their rights in the SDP, including the processes to resolve issues or complaints. If requested, the SDP Office can assist with the resolution process by connecting regional centers, financial management services (FMS) agencies, independent facilitators, and/or other entities. In some cases, the SDP Office also may connect individuals and families with other internal or external partners who can provide further support.

The SDP Office cannot decide disputes in favor of one party or another, represent someone in the appeal process, overturn a fair hearing decision or make a recommendation to a court.

- Compiling and reporting data to the Legislature
- Recommending changes to the Department and the Legislature

The SDP Office opened in October 2021, soon after it was established in law ([Welfare & Institutions Code section 4685.9](#)) in July 2021. The SDP Office can be contacted through a few different methods, including email, phone, and an online intake form. All contacts received by the SDP Office are confidential. Contact information, resources, and more information about the Office and its staff can be found on the Office's webpage:



<https://www.dds.ca.gov/initiatives/sdp/office-of-the-self-determination-ombudsperson/>

ABOUT THE OFFICES (CONTINUED)

The Office of the Ombudsman (Office) is also an independent entity within the Department. The Office helps individuals served by the regional center and their families and people applying to access the services under the Lanterman Act by:

- Providing information and assistance

The Office helps people to understand the application process for regional center eligibility. If needed, the Office can assist callers by walking them through websites and explaining next steps. Callers are also provided with information about the regional center structure and available regional center services.

- Facilitating solutions to disagreements

The Office helps individuals served by the regional center and their families understand their rights, including the processes to resolve complaints or appeals. If requested, the Office can assist with the resolution process by connecting with regional centers. In some cases, the Office also may connect individuals and families with other internal or external partners who can provide further support.

The Office cannot decide disputes in favor of one party or another, represent someone in the appeal process, overturn a final hearing decision or make a recommendation to a court.

- Compiling and reporting data to the Legislature

- Recommending changes to the Department and the Legislature

The Office opened in December 2022. The Office can be contacted through a few different methods, including email, phone, and an online intake form. All contacts received by the Office are confidential. Contact information, resources, and more information about the Office and its staff can be found on the Office's webpage:



<https://www.dds.ca.gov/initiatives/office-of-the-ombudsman/>

CONTACTS RECEIVED BY THE OFFICE

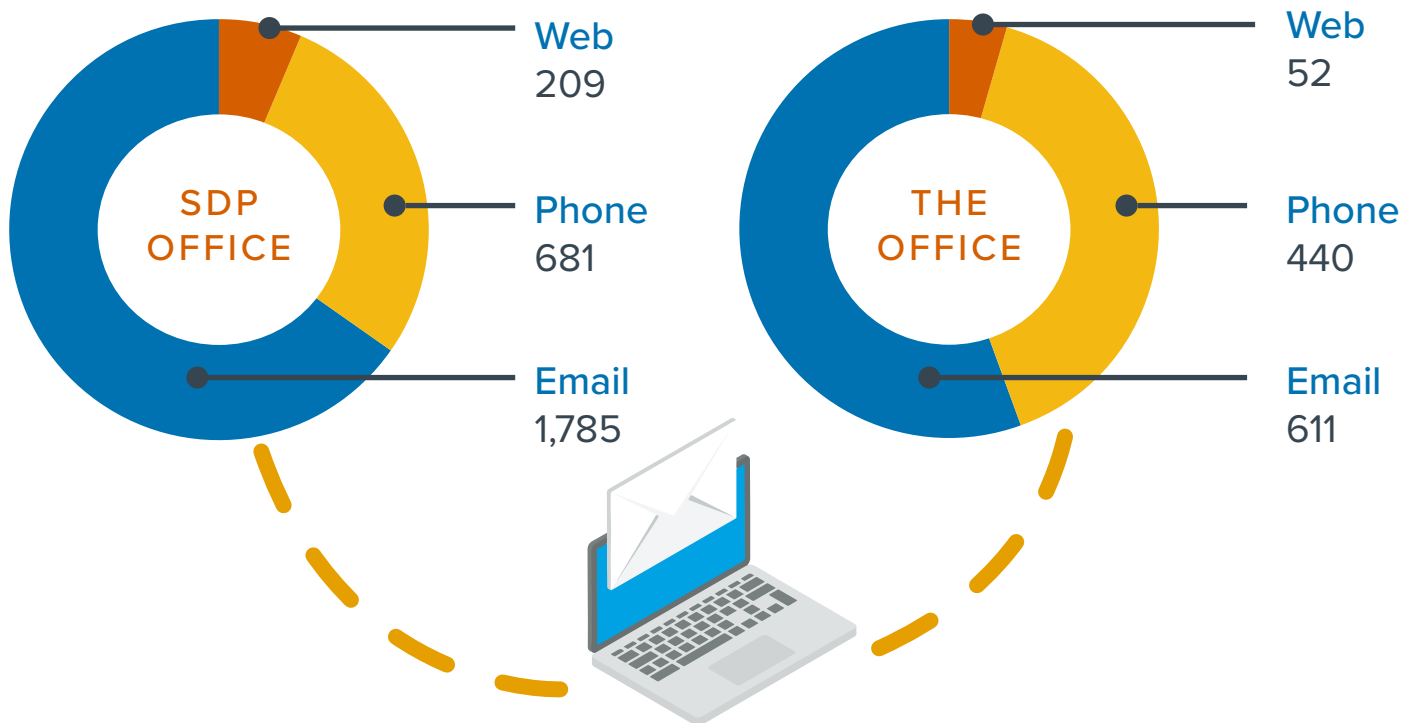
The data charts in this section provide a high-level overview of all the contacts received by both Offices as of June 30, 2024. Additionally, the Offices webpages include interactive dashboards with data related to contacts and resolutions:

 <https://www.dds.ca.gov/initiatives/office-of-the-ombudsperson/>

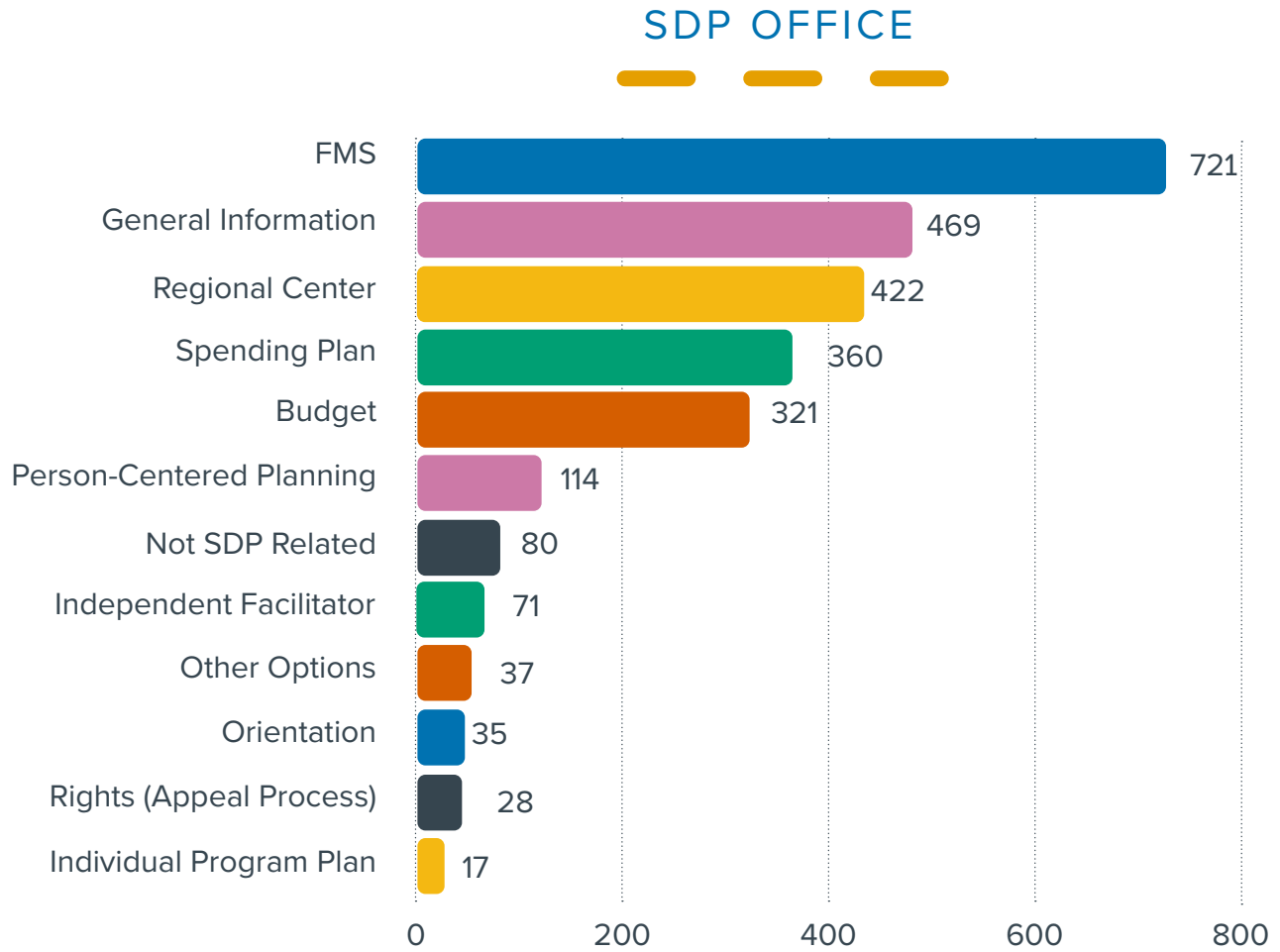
CONTACTS BY COMMUNICATION TYPE

As of June 30, 2024, the SDP Office received **2,675** total contacts, most of which were received through email. Counts may include more than one contact from the same person.

Similarly, the Office received **1,103** total contacts, most of which also were received through email.



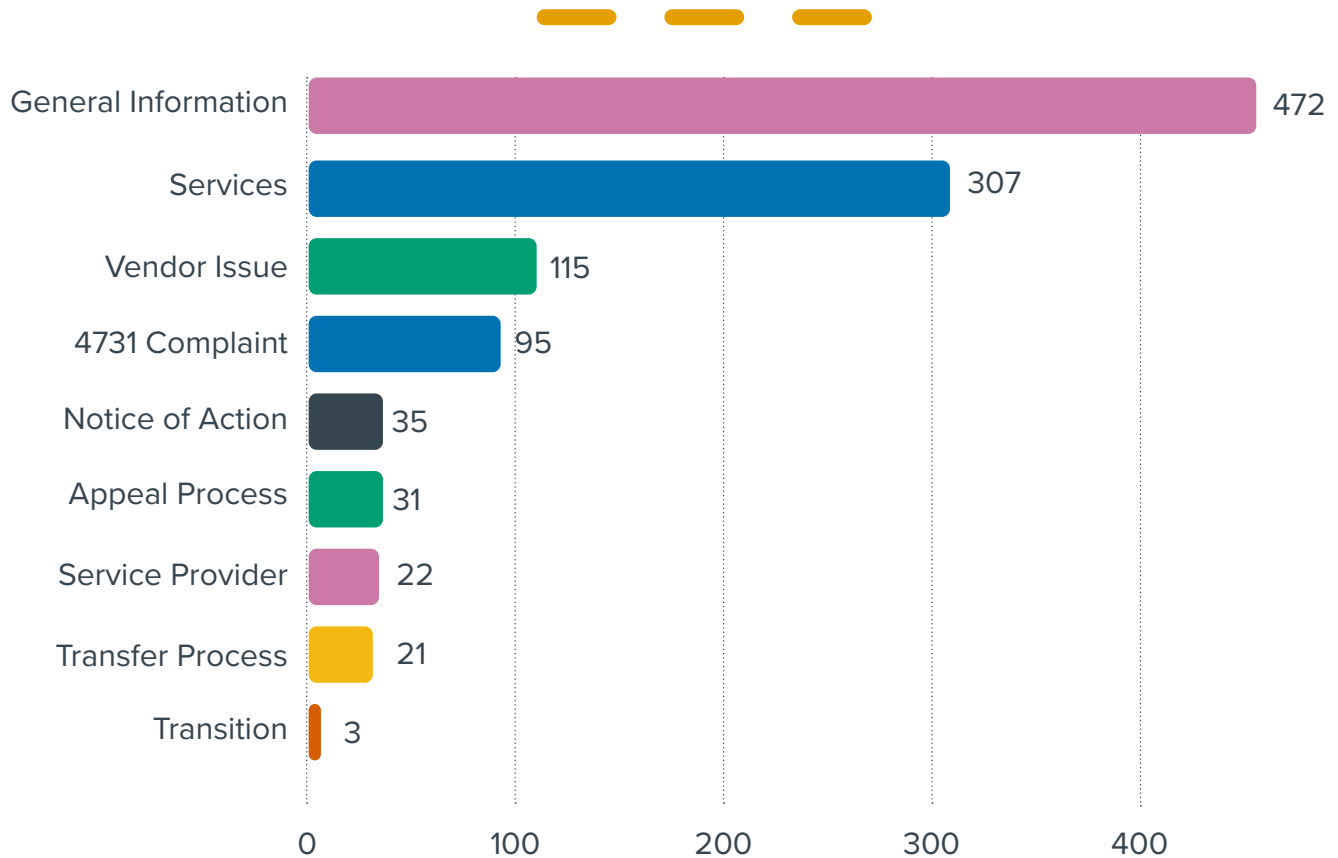
CONTACTS BY CATEGORY



- The chart above shows a breakout of the total SDP Office contacts received, by category. When the SDP Office receives a contact, it is categorized in the database based on the person’s primary concern. Most contacts concern FMS agencies. These contacts can include questions or issues about payments, onboarding, FMS availability, or communication with FMS agencies.
- The second-largest category is General Information which can include questions about what the SDP is, how it works, and the steps to join.

CONTACTS BY CATEGORY

THE OFFICE

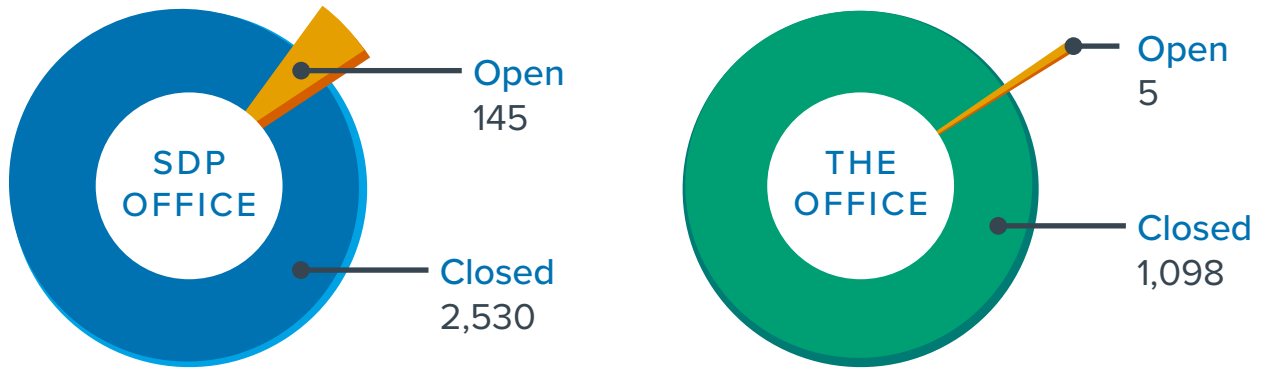


■ The chart above shows a breakout of the total contacts received by the Office, by Category. When the Office receives a contact, it is categorized in the database based on the person's primary concern. Most contacts concern general information. These calls concern understanding the process for eligibility, the timelines for an eligibility determination, and what to do if they are denied eligibility.

The second largest category is Services. These can include questions about availability of services or accessing services.

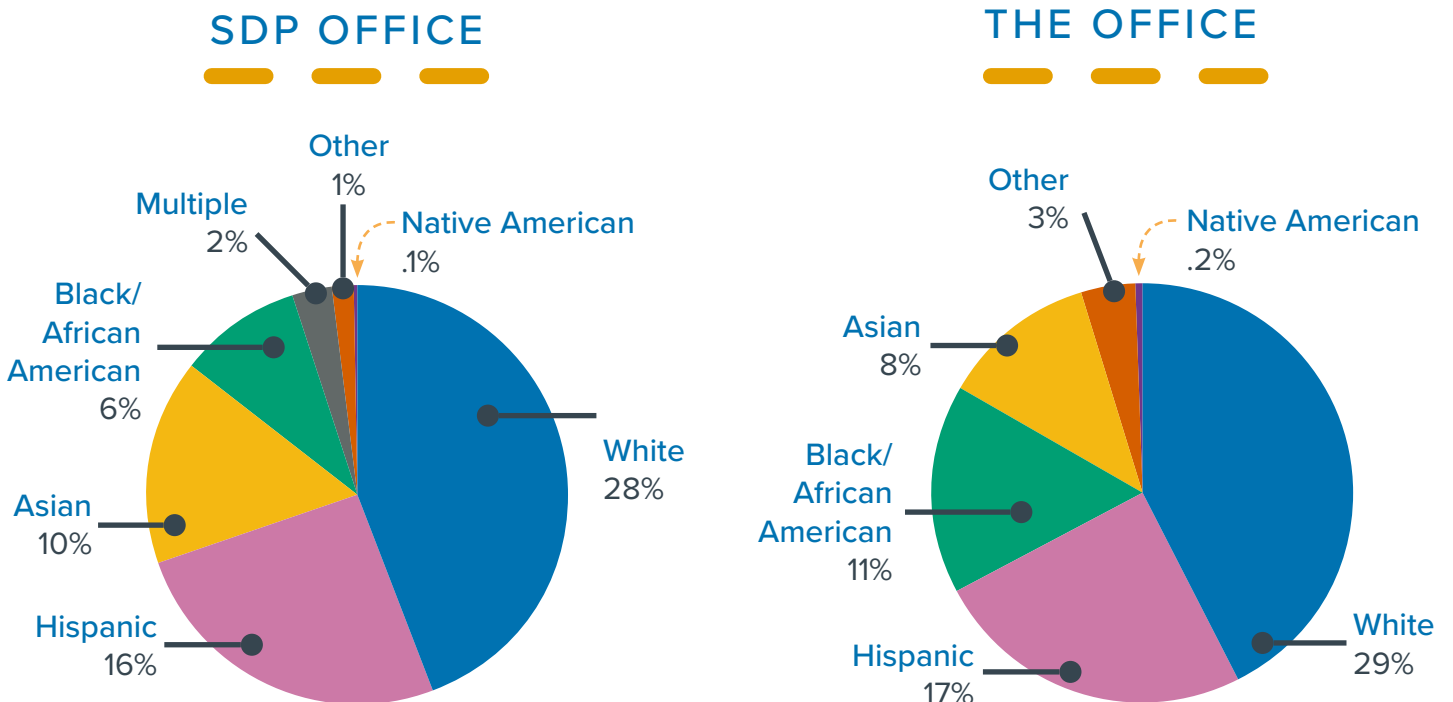
CONTACTS BY STATUS

The charts below show a breakout of total contacts by open or closed status. When a contact is marked “closed”, this means the question or issue has been addressed. When a contact is marked “open”, this means the appropriate office actively is providing necessary information or support to the requestor. For both offices, almost all the contacts through June 30, 2024 now are closed.



CONTACTS BY RACE

Providing race or ethnicity information is optional when contacting the offices. The chart below shows the percentage share of each race for contacts that chose to report this information. Race was not reported for **37%** of SDP Office contacts and **30%** of Office contacts.

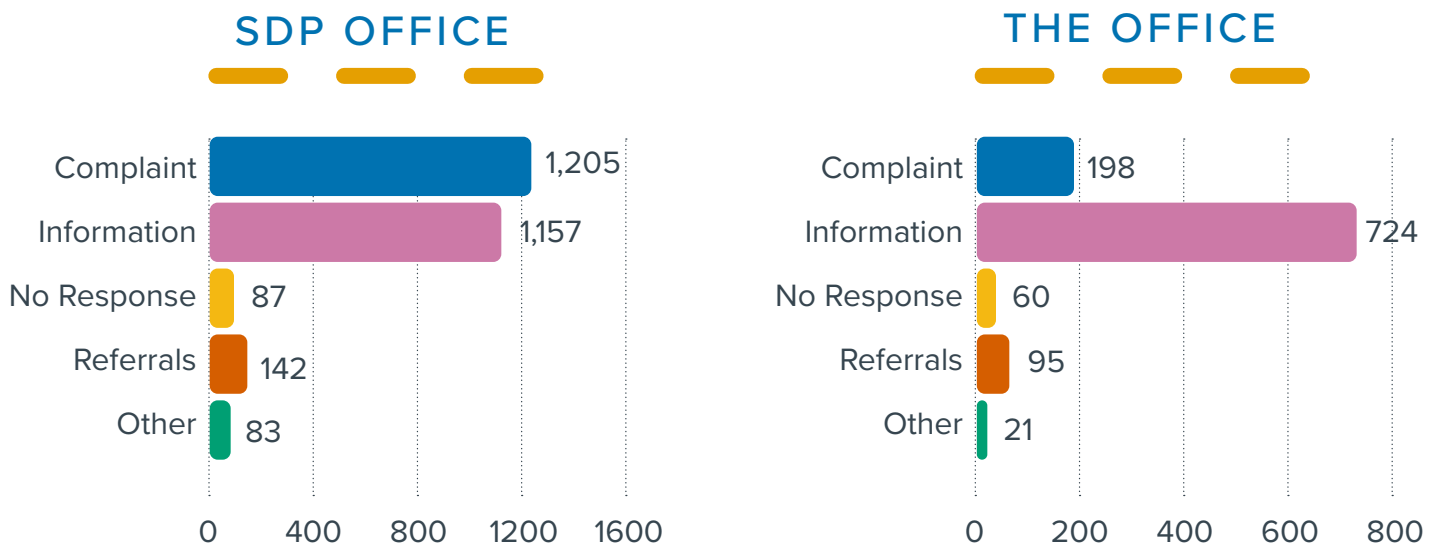


CLOSED CONTACTS BY RESOLUTION CODE

When a contact is closed, it is considered resolved under one of the following resolution codes:

- **Information:** The person was provided with information to answer a question and/or clarify how to access a resource.
- **Complaint:** The person reached out regarding an unresolved issue or an issue resolved unsatisfactorily. The offices may have connected the person to other parties involved to resolve the issue or may have simply tracked that the issue occurred.
- **Referral:** The person was referred to a more appropriate entity for information or conflict resolution.
- **Other:** The contact was not resolved under any of the resolution codes above.
- **No Response:** The person did not respond to three outreach attempts by the Offices.

The charts below show the total contacts closed by resolution code.



COMMUNITY OUTREACH & ASSISTANCE

Both Offices are active partners in the intellectual and developmental disability community and have participated in over **160** outreach events throughout the State since opening. This includes participation in meetings, conferences, presentations, or trainings for groups such as, but not limited to:

- Parent and Family Support Groups
- Advocacy and Awareness Groups
- Family Resource Centers
- Independent Facilitators
- Statewide and Local Advisory Committees
- The Association of Regional Center Agencies
- Regional Centers
- Participant Choice Specialists
- The State Council on Developmental Disabilities
- FMS Agencies
- The Department of Developmental Services

The Offices coordinate meetings with community groups and stakeholders to gather feedback on lived experiences, identify areas for continued improvement, and collaborate on solutions to common issues. These outreach efforts are key in informing the recommendations the Offices present to the Department and the Legislature to inform policies and changes to improve the SDP and Lanterman Act.



POSITIVE OUTCOMES



“All of our providers have been paid and we finally can close out [the year]... Thank you for working hand-in-hand with us all to remedy this matter.”

MISSING PAYMENTS IN THE SELF-DETERMINATION PROGRAM

A parent reached out to the SDP Office to report 3 months of missing payments to the communication support. The parent requested to reallocate funds to communication support on the spending plan to ensure her vendor could be paid. She couldn't get confirmation from the regional center that the [spending plan](#) change has been completed nor was she able to get a response from the [financial management services \(FMS\)](#) vendor regarding the missing payments. The Office suggested she send one more email and add the Office to it. She did. The FMS vendor replied to the parent and worked with the regional center to ensure the authorization was updated and the communication support was paid.

COMMUNICATION IN THE PREFERRED LANGUAGE

A Spanish-speaking parent reached out to the SDP Office because she did not have a budget from the regional center despite her requests. She wanted to start making the spending plan to transition her child into the Self Determination Program. The parent forwarded a series of emails written in English to the Office. SDP Office staff translated the emails into Spanish for the family. The SDP Office, with permission of the family, requested the regional center correspond in Spanish in the future. SDP Office staff then helped the family understand the initial budget and the next steps to take.

BACKGROUND CHECK EXEMPTION

The SDP Office received an urgent email just before a long weekend. The person was concerned because their worker had been suspended when they were arrested. Staff who provide direct personal services must pass a [background check](#) before they can provide services in SDP. If the worker is subsequently arrested the clearance is revoked and they cannot work until it is resolved. In this case, the worker was not charged with a crime following their arrest. They had submitted documentation to have their clearance reinstated. With a holiday weekend coming up, they were eagerly awaiting a response because they did not have a backup worker for the weekend. The SDP Office reached out to DDS' Office of Protective Services who were able to expedite the clearance request and get the employee reinstated in time for the long weekend.



“The information [provided by the Office] is golden...”




LEARNED ABOUT REGIONAL CENTER SERVICE

A family contacted the SDP Office to inquire about services in Self-Determination. The family had just finished Orientation and weren't sure of the next step. Through discussion, the staff member realized that the client was only receiving a day program from the regional center. It was also determined that the family didn't know about the In-Home Supportive Services (IHSS) Program. The staff member had them go to the regional center website while on the phone. Together they navigated the page and learned about services such as Respite, Personal Attendant, and Independent Living Services. They also looked at the local parent support groups available at that regional center. They also went on the SDP page to view the information about the next Local Volunteer Advisory Committee meeting. They also looked at the IHSS page to show the parents how to apply. Lastly, they went on the DDS webpage to look at service definitions and codes in SDP. The family was then ready to access additional services in the traditional system and possible SDP in the future.

BACK TO DAY PROGRAM TO SEE THEIR FRIENDS

When the pandemic restrictions started to lift, many individuals went back to their [day program](#) in-person instead of continuing hybrid virtual programs, except for this family who contacted the Office. The individual wanted to go back to full-time at their day program not just the 3 days they were attending. The parent also was concerned that the day program was requiring their adult child to use his wheelchair, not his walker. Not using the walker daily had inhibited both their interest in using it and their abilities overall.

The Office reached out to the Service Coordinator to inquire about the status of increasing the individual's attendance to full-time, 5 days per week again. The Service Coordinator shared that one barrier was the lack of staff at the program to achieve the needed staffing ratio. The Service Coordinator also shared that the wheelchair was being used for fall prevention and with increasing the staff, there could be more support in the future for using the walker. An IPP meeting occurred, and the parent was happy to report that the day program would be available 4 days per week, then would progress to 5 days per week the next month. The individual is very happy to be able to see their day program friends again.





“I wanted to express my heartfelt appreciation for your invaluable assistance. Without your input, I would not have made the significant progress I have achieved. Thank you very much for your time and advice.”

ACCESSING APPEAL RIGHTS

A monolingual Spanish-speaking family contacted the Office requesting information on how to appeal a service denial. The family shared that they had not received a Notice of Action (NOA) but were informed about the denial through a phone call with the Service Coordinator. The Service Coordinator sent an [appeal information packet](#) through email but no NOA explaining the reason for the denial. Furthermore, the family called the Service Coordinator several times and was not receiving any information. The Office shared information about the appeal process with the family and explained they could appeal without an NOA through the [online appeal form](#). The parent requested printed information from the Office to read. The parent was pleased with receiving printed information on Appeal Rights, Appeals Timeline Information, and also the form to file a [4731 Complaint](#) about not receiving an NOA.

REGIONAL CENTER ELIGIBILITY

A parent contacted the Office early in July to learn about their Regional Center's intake process. The parent explained she started the [intake process](#) for her child back in November of the year prior and had not received any notification about whether he was eligible or ineligible for regional center services. The parent stated she was not upset, rather she just wanted to know the status of his application and if any additional assessments were required or if he is eligible. The Office reached out to the Regional Center to inquire on the status of the application. The Regional Center confirmed they received the application and were reviewing it to determine eligibility. On July 20th, the Office shared with the family information received from the Regional Center that their son was determined to be eligible, and that a Service Coordinator would be assigned shortly to conduct the [Individual Program Plan](#) meeting. The parent thanked the Office for the good news.

"I appreciate you reaching out to me with all the information regarding SDP. After speaking with you I want to look into other programs on the vendor list. I also will be looking into finding my daughter another case manager. Once again, I am extremely grateful for your service and your help."  

IMPROVEMENTS TO THE SDP

The SDP Office strives to be an effective, accessible, and purposeful part of the successful path forward for the SDP. One of its primary functions is to assist individuals served by regional centers and their families with participation in the SDP and address any issues or barriers they are experiencing. Below are some of the efforts the Office has been closely involved in to improve the participant experience, along with recommendations from the SDP Ombudsperson to the Department to further improve in these areas:

FMS

Payments to FMS Agencies

Many participants reported having problems getting timely payments issued by FMS agencies. The SDP Office worked with the Department to increase the frequency with which the regional center reimbursed FMS agencies to create additional cash flow. The Department issued directives requiring regional centers to pay FMS agencies weekly, which can be found at the following links:



https://www.dds.ca.gov/wp-content/uploads/2022/09/Self_Determination_Program_FMS_Services_Payments_Notifications_09122022.pdf



<https://www.dds.ca.gov/wp-content/uploads/2023/10/Self-Determination-Program-Financial-Management-Services-Payments.pdf>



https://www.dds.ca.gov/wp-content/uploads/2024/12/SDP_FinancialManagementServicesPayments.pdf

During the COVID-19 pandemic, the FMS fees in the participant's budget could be reallocated towards needed services and the regional center would pay the fees outside of the budget. When the State of Emergency ended, this option was no longer available. However, the statute (Welfare and Institutions Code section 4685(c)(1)) was amended to have regional centers pay FMS agency fees outside of the budget permanently. This gave participants additional money to purchase needed goods and services. The Department's directive regarding these changes can be found here



https://www.dds.ca.gov/wp-content/uploads/2022/07/Regional_Center_Payment_of_Financial_Management_Services_for_SDP_Participants.pdf

The SDP Office received concerns related to payments for services and supports, setting up initial services and staff, general availability of FMS agencies, and communication. The SDP Ombudsperson recommended that the Department evaluate monthly rates for FMS agencies. After conducting an evaluation as recommended, the Department revised the FMS rates. More information on these rate revisions can be found in the Department's directive linked here:

 <https://www.dds.ca.gov/wp-content/uploads/2023/04/SDP-FMS-Revised-Rates-FINAL.pdf>

INDIVIDUAL BUDGETS & SPENDING PLANS

Continuing the Individual Budget and Spending Plan

Some program participants are faced with an interruption of services moving from one budget year to the next due to disagreements concerning individual budgets/spending plans or scheduling conflicts with the Individualized Program Plan (IPP) team. The SDP Office assisted the Department with the development of a directive that allows the regional center to identify which of two methodologies best fits that participant's situation and to determine whether to extend the existing funds or renew while the existing budget and spending plan is certified:

 https://www.dds.ca.gov/wp-content/uploads/2023/01/SDP_Continuing_the_Individual_Budget_12302022.pdf

Billing System Improvements and Spending Plan Resources

Due to concerns that the billing system is resulting in errors, delays in financial transactions, and administrative work, and at the recommendation of the SDP Ombudsperson, the Department made backend improvements to the billing system to reduce these issues. These improvements include the ability to: edit the budget end date, invoice beyond 12 months, bulk upload, and mass transfer within UCI numbers. Additionally, the SDP Ombudsperson recommended establishing clear guidelines for the review of spending plans, to reduce confusion about what is allowable and whether services should be purchased based on price versus preference. A spending plan template may be useful for SDP participants to better understand what information regional centers and FMS agencies need to logistically process a spending plan, which the Department is considering.

REGIONAL CENTERS

Funding to Support Transitions Into the SDP

The SDP Office learned that participants were experiencing challenges with the person-centered planning process, which led to some participants not having enough funds to support them with the transition into the SDP. To address this issue, the SDP Office assisted with developing a payment structure with caps and guardrails so individuals can receive the support they need when entering the SDP. More information can be found in the the Department's directive linked here:



<https://www.dds.ca.gov/wp-content/uploads/2023/07/Self-Determination-Program-Final-Extension-of-Initial-Person-Centered-Plan-Pre-Enrollment-T.pdf>

Extension and Development of Standardized Vendorization Packets

The SDP Office presented concerns expressed by independent facilitators and others in the self-determination community regarding the cumbersome process to become a regional center vendor to the Department. In response to these concerns, the Department released a standardized vendorization packet for Self-Directed Supports as a solution:



<https://www.dds.ca.gov/wp-content/uploads/2023/03/SDP-Standardized-Vendorization-Packet-for-Pre-Enrollment-Services.pdf>

In accordance with SB 138 (Chapter 192, Statutes of 2023), the Department is establishing standardized vendorization procedures for other regional center services in the developmental disabilities services system.

Clarity on Who Can Be a Service Provider

The SDP Office discovered that regional centers and FMS agencies had different viewpoints on who could be a service provider. Some allowed a conservator to be a service provider, while other centers did not. Working with the Department, the frequently asked questions (FAQs) on the website were updated to clarify that a conservator could be a service provider on the spending plan:



<https://www.dds.ca.gov/initiatives/sdp/frequently-asked-questions/>

LOCAL VOLUNTEER ADVISORY COMMITTEES (LVAC)

Meeting Structure and Best Practices

The end of the COVID-19 state of emergency meant that the Bagley-Keene Open Meeting Act's in-person meeting requirements resumed. This would have required LVACs to hold meetings in person. The Office worked with the Department to re-analyze whether Bagley-Keene applies to them. The Department released a directive that clarified Bagley-Keene does not apply to LVAC meetings and gave best practices for the committees to follow:



<https://www.dds.ca.gov/wp-content/uploads/2023/07/Self-Determination-Program-Meetings-of-the-Local-Volunteer-Advisory-Committee.pdf>

Of note, SB 143 and SB 544 both were enacted in September 2023, allowing remote meetings to continue even for Bagley-Keene entities, if following specified procedures.

IMPROVEMENTS TO THE REGIONAL CENTER SYSTEM

ASSISTANCE FOR INDIVIDUALS CONSERVED BY THE DEPARTMENT OF DEVELOPMENTAL SERVICES

The Department is the conservator for a number of people. An expert panel was convened to review the Department's conservatorship program. The Department delegates its power to the local regional centers for administration of the bulk of the needed decisions. There is a potential conflict of interest in this arrangement. Out of an abundance of concern for the conservatees, the Department asked the Office to visit or arrange visits to each conservatee, itself or by the California Department of Social Services (CDSS) or the California Department of Public Health (CDPH). The Ombudspeople coordinated with other departments and also personally conducted visits. These visits have been completed for all conservatees of the Department, and led to referrals for additional action in 61 situations. The Ombudspeople's visits led to referrals for additional services and supports in 53 instances. Of those, 28 were concerning day activities. This included attending a day program more days per week, changing day programs, or engaging in work activity. The Department now has a contract with Disability Rights California's Office of Client's Rights Advocacy to visit all new conservatees on an ongoing basis.

PRIORITIES FOR 2025

In the year ahead, the Offices will continue to prioritize community outreach and engagement, especially to diverse communities, to share information, improve understanding of the service system, and maintain visibility of any issues raised by the community that need to be addressed. The Offices are committed to facilitating both immediate and longer-term solutions to support the individuals and families it serves. The Offices send a feedback survey to all contacts. This survey collects information about the community's experience and satisfaction in contacting the offices so it can best serve them.

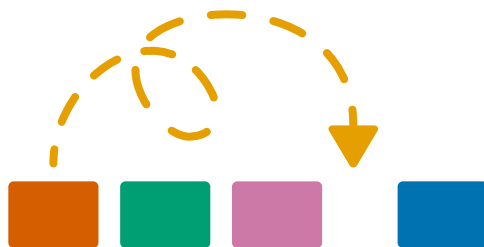
The Offices also will be observing hearings for Lanterman Act eligibility and service appeals in order to better support individuals who may have questions or need help with the process in the future, and will provide feedback to the Department regarding the process.

Additionally, the Offices will focus on improving data collection and sharing information on its webpages to provide insight into its community contacts and trends. The interactive data dashboards are at:



<https://www.dds.ca.gov/initiatives/office-of-the-ombudsperson/>

The Offices track data and trends gathered through community contacts to identify issues that may need to be addressed or investigated. The Offices will continue to meet regularly with groups such as FMS agencies, local advisory committees, parent support groups, regional center staff, and participant choice specialist teams to gather feedback, discuss and present issues, and develop best practices or program policies.



February 19, 2025

**AGENDA ITEM 7.
INFORMATIONAL ITEM**

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

SCDD Updates

Executive Director Aaron Carruthers will provide members with an update on SDP-related activities the Council is participating in which may include legislative and SDP orientation activities.

Attachments

None – there may be handouts on the day of the meeting.

February 19, 2025

**AGENDA ITEM 8.
INFORMATIONAL ITEM**

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

Coro Project: Budget Process Map

In January 2025 the SSDAC Workgroup collaborated with CORO Fellowship in Public Affairs participant David Delgado to create a process map aimed at identifying and addressing unnecessary administrative burdens within the SDP budget development process.

Co-Chairs and SSDAC Workgroup members who participated in this project will provide an overview of the work that was done and present the Budget Process Map.

Attachments

None

Handouts

SDP Budget Process Map

SDP Budget Process Map Step-by-Step Guide

February 19, 2025

**AGENDA ITEM 9.
INFORMATIONAL ITEM**

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

SSDAC Townhall Report

Co-Chairs Rick Wood and Nestor Nieves will review highlights from the 2025 SSDAC Townhall Report and discuss next steps with members. The issues and recommendations outlined in this report may be used to inform the committee's future goals and priorities.

Attachment(s)

2025 SSDAC Townhall Report



Principles of Self-Determination

Insights from the December 4, 2024,
Town Hall and Recommendations for Future
Success

A Statewide Self-Determination Advisory Committee Report to the Department of Developmental Services

Prepared by

THE CALIFORNIA STATE COUNCIL ON
DEVELOPMENTAL DISABILITIES

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“The SDP has been a fantastic experience for my son, allowing us to tailor a program that fits his needs perfectly. With the support of staff who can accompany him to his activities, he has the opportunity to explore and engage in a variety of experiences.”

-Town Hall Participant

Background

Since the statewide rollout of the Self-Determination Program (SDP) in July of 2021, enrollment in the program has continued to climb, allowing regional center consumers and families to exercise greater freedom and control in accessing the services and supports they need to live the lives of their choosing. The SDP is implemented by regional centers with the support of a network of Independent Facilitators, Financial Management Service Providers, and with the oversight of the Department of Developmental Services. As participation in the program expands, these stakeholders continue to work together to address emerging issues and systemic concerns, eliminating barriers and working toward making the program a success.

On December 4, 2024, the SSDAC held a Town Hall event, providing an open forum for members of the public to share their experiences with the SDP and offer recommendations to improve the program. The SSDAC asked members of the public to reflect on the five principles of Self-Determination: freedom, support, responsibility, authority, and confirmation, and what can be done to ensure that the program operates in alignment with those principles. The SSDAC is committed to fulfilling its statutory responsibility to monitor implementation concerns and systemic issues and believes that participants can provide key insights and offer unique solutions to the barriers that they face. By seeking this input and responding to the expressed needs and concerns of the community, DDS, regional centers and other stakeholders can implement policies and practices that lead to meaningful improvements in the lives of people with intellectual and developmental disabilities and their families.

“Self-Determination is a game changer and I love it. It is like having your very own day program but with the people that you know and trust. I recommend it.”

-Town Hall Participant

Highlights

Freedom

Town Hall participants reported that they experience barriers to making choices about the supports and services they need because of limited options for paying for or being reimbursed for those supports. Lengthy processing times for spending plan changes and payment delays between fiscal years were also indicated as barriers, as they significantly delay access to services/supports that meet urgent/unmet needs.

Support

To support regional center consumers, Town Hall participants stated that we must ensure that they are all provided with the same information about the availability of, and the pros and cons of the Self-Determination Program. Additionally, regional centers can support consumers and families by providing greater access to linguistic supports (translated materials, bi-lingual service coordinators, etc.) and ensuring that those who provide support to SDP participants have greater disability and cultural awareness. Town Hall participants also indicated a need for greater access to well trained, knowledgeable Independent Facilitators.

Responsibility

Self-Determination Program participants recognize that they have a responsibility to understand their own role in obtaining the services and supports that they need. Town Hall participants expressed a need for additional training, especially as it pertains to their responsibility as employers. The training and resources/materials that are provided to consumers and families must be in Plain Language to ensure greater understanding.

Authority

Town Hall participants expressed that they experience barriers to exercising authority over their budget/spending plan when regional center staff place unnecessary restrictions and/or fail to use a person-centered approach. Participants also expressed concerns about a lack of clarity and enforcement of Self-Determination Program directives.

Confirmation

SSDAC Town Hall participants expressed that they experience confirmation when they are able to work with a team that validates their goals and enjoys helping them make progress toward realizing success in the Self-Determination Program.

Public Recommendations

Freedom

- Make it clear to SDP participants and Financial Management Service providers what reimbursements are allowable and ensure that they are processed timely.
- Require that FMS providers allow access to advanced payment for goods and services that can't be paid via invoice.
- Require that FMS providers allow access to pre-paid debit cards for approved purchases.
- Explore options to allow spending plan changes through the FMS portal.
- Develop and implement a standard timeline for processing spending plan changes.
- Make sure clients and families are informed that they are not restricted to disability services providers and can choose services that will meet their needs.

Support

- Ensure that the SDP information that is provided to consumers, along with the formal acknowledgement that this information was received, is made uniform between regional centers.
- Provide additional training for families to help them better understand the SDP process.
- Collaborate with community-based organizations that can support families and self-advocates on a cultural level.
- Ensure that Independent Facilitators are provided with robust training and fair wages.
- Create and/or promote resources to help SDP participants locate quality support services.

Responsibility

- Increase access to Plain Language resources/materials regarding the consumer's responsibilities as employers.
- Provide additional training opportunities for consumers/families pertaining to their responsibilities as employers, regional center policies/processes, and how the SDP works.

Authority

- Provide comprehensive budget and spending plan training for regional center/SDP department staff.
- Standardize a spending plan template.
- Release a directive that addresses regional centers imposing POS standards on SDP spending plans.
- Provide deadlines for implementing directives.
- Provide direct oversight/monitoring of the implementation of directives.
- Consider how each directive will change regional center procedures and have very clear direction for all users.

Full Report of Public Input/Findings

Freedom

What barriers prevent individuals from making personal choices freely? How can we remove these barriers?

Freedom is the first principle of Self-Determination and is a primary driver of consumers interest in enrolling in the program. Self-Determination Program participants are seeking the freedom to decide where and how they want to live, how they will spend their time, and how they will receive supports and services. Participants in the SSDAC Town Hall identified the following barriers to accessing the freedom that the SDP is meant to help them achieve.

“Self-Determination has made a huge difference for my son. He has dual diagnosis autism and schizophrenia, and that prevents him from accessing traditional services. He now goes to a trainer three times a week and he takes Uber. He has some independence now that he is able to take Uber anywhere he needs to go.”

-Town Hall Participant

REIMBURSEMENT AND PAYMENT OPTIONS

Town Hall participants overwhelmingly reported that restrictions on reimbursements and payment options impede their freedom in the Self-Determination Program. Though a good or service has been identified as necessary and approved by the regional center, limited means of making timely payments make them inaccessible for families.

“The ability to select specific goods and services is restricted when there is no option for family reimbursement. The FMS often takes a considerable amount of time to process these purchases, making it simpler for families to buy them outside of the SDP. This limitation hampers the choices available to SDP clients, taking away their freedom to obtain what they need.”

“We need to make it clearer and more accessible when a participant does have the option to use a unique card to purchase some of their supplies. There are still many unmet needs.”

“I want to ask why my FMS aren't allowed to reimburse payments anymore. There are situations where there are no gas stations that I've been provided cards for, or when my service dog needs to go to the vet. The vet does not want to go through the long, drawn-out process of getting vendorized. These issues are causing a lot of problems and taking away my freedom and choice.”

“One of my concerns is if there is anything that would allow the parent or legal guardian to be reimbursed for [necessary] goods. The example I use is orthopedic shoes. Medicare doesn't cover it, but it's something that's required and that the regional center has approved, but you

have to onboard the vendors even when you're only going to be accessing that service every six months.”

“We are very rural, and IFs aren't able to be paid for travel time to [meet with] people they're supporting in rural areas. I would like to see a way for them to be reimbursed for their travel time and face-to-face meetings so that people have more access to their IFs when needed.”

“I would love to see the opportunity for there to either be advanced pay or a debit card for specific purposes that would allow people to make purchases. My son was in the original pilot for 25 years and we had the opportunity for advanced pay to purchase stuff that you can't go to a vendor and bill for. People need money to access services and goods, or [they need] reimbursement.”

PUBLIC RECOMMENDATION:

- **Make it clear to SDP participants and Financial Management Service providers what reimbursements are allowable and ensure that they are processed timely.**
- **Require that FMS providers allow access to advanced payment for goods and services that can't be paid via invoice.**
- **Require that FMS providers allow access to pre-paid debit cards for approved purchases.**

PAYMENT DELAYS BETWEEN FISCAL YEARS

Town Hall participants expressed that they continue to face interruptions in services due to administrative delays when moving from one budget year to the next and requested that the Department work with Financial Management Service providers to address this issue.

“FMS agencies are not allowing clients to start their new year until they have the fully authorized POS. I have clients whose staff can't clock in. They can't pay any of their vendors. They can't do anything until the FMS has received the fully authorized POS authorization. That needs to be addressed.”

“When my son's budget renewal happened, the FMS did not input it into their system. The first time that we realized this was when one of his providers submitted an invoice. It was submitted in October and about three or four weeks later I got an email saying that that my son has no budget. I have a wonderful IF, and the team worked very hard. The FMS has apologized and reinstated the budget, but I want to know how there can be more transparency. This shouldn't have happened in the first place, but how can this be prevented?”

SPENDING PLAN CHANGES

Town Hall participants reported that processing times for changes to spending plans create barriers to receiving services and exercising their freedom to address urgent and/or unmet needs.

“Regional centers [need to] be consistent with their timelines and response times to spending plan changes. There are regional centers that are taking over 60 days to process a spending

plan change, even though we've given them all the information they need. This is causing a barrier [to making] last minute changes that are quite urgent and for unmet needs that come up.”

“I have some solutions to offer. I have friends in Minnesota who are in self-directed services, and to move money on the spending plan, they just log into it on the computer. They may move a thousand dollars personal training to staff or vice versa. I can see needing a spending plan approved when it's a revision and you're adding completely new services, but when you just need to move money from [one area to another], it should not have to go through all the bureaucracy that we have right now. There should be a simple way to move those funds without going through all of that.”

PUBLIC RECOMMENDATIONS

- **Explore options to allow spending plan changes through the FMS portal.**
- **Develop and implement a standard timeline for processing spending plan changes.**

“Self-determination has changed my life for the better and helped me grow as an independent person. It gave me the courage to pursue my dreams of independent living and Culinary Arts. In my first year of being in the self-determination program I learned how to work my action plans to make progress toward my personal goals.”

-Town Hall Participant

OTHER CONSIDERATIONS FOR INCREASED FREEDOM

Town Hall participants shared the following thoughts about barriers to exercising freedom in the SDP:

“Regional Center red tape, delays, and lack of response [restrict freedom]. [So does} the process being difficult to understand.”

“FMS is a big problem in starting a new service or hiring new caregivers.”

“Pre-determined "Program designs" by vendors are not adjustable to client needs because of contracts that we were not [involved in] creating.”

“Undue influence by staff or facility, or relatives using Limited Conservatorships.”

“You cannot decide for yourself. You always have to consult to be approved.”

PUBLIC RECOMMENDATIONS:

- **Make sure clients and families are informed that they are not restricted to disability services providers and can choose services that will meet their needs.**

Support

What types of support do people need most to exercise self-determination? What existing supports should be improved or reimaged?

Although the Self-Determination Program offers greater freedom, choice and flexibility to participants, it is undeniably a more complex system to navigate than traditional regional center services. It is crucial that those who are interested in receiving services through the SDP are provided with sufficient support to understand the program (e.g., how it differs from traditional services, pros and cons, etc.) and to navigate the process of enrolling and accessing services.

INFORMING REGIONAL CENTER CLIENTS ABOUT SDP

Beginning January 1, 2025, regional centers will be required to have every RC consumer sign an acknowledgement that they have received information about the SDP. Town Hall participants expressed concern about ensuring that the information that consumers and families are receiving does not vary significantly between regional centers. They expressed that standardizing this information may be helpful in reducing racial disparities in SDP participation.

“[We must] ensure that every single consumer of every regional center knows about the Self-Determination Program. Right now, I would guess that the vast majority of consumers have never even heard of the program. How are you going to increase the numbers and make SDP the core of the system if nobody knows about it?”

“There is a lot of information [about the SDP] that is subject to interpretation, and some RC presentations might be more compelling than others [regarding] letting people know what the SDP is about. [That could] be avoided if we had uniform information in the form of a simple chart that shows pros and cons of the SDP versus the traditional model. If we had a standardized piece of information, much like the IPP is now being standardized, I think that's step in the right direction.”

“Please streamline communication and build an easy-to-understand toolkit. SDP is different from one regional center to the next and from one family to the next. It's unfortunate that it seems that family A isn't treated the same or given the same opportunities as family B. There is a ton of misinformation out there.”

“We are new to SDP but I am happy to interact in particular with our FMS provider's team as they have always been very responsive and help advise on ways to streamline the process for working with vendors.”

-Town Hall Participant

PUBLIC RECOMMENDATIONS

- **Ensure that the SDP information that is provided to consumers, along with the formal acknowledgement that this information was received, is made uniform between regional centers.**
- **Provide additional training for families to help them better understand the SDP process.**

CULTURAL/DISABILITY AWARENESS AND LANGUAGE BARRIERS

SSDAC Town Hall participants overwhelmingly expressed the need for better communication at the regional center level and described a variety of concerns regarding cultural sensitivity, disability awareness, and the accessibility of services for people who speak a language other than English. Participants shared their experiences with feeling that their input is not being heard or valued. Self and family advocates alike expressed a fear of retaliation from the regional center when expressing their concerns. Participants expressed a need for regional center staff and executives to listen to culturally diverse voices and center the voices of people who have lived experiences with disability, especially those with high support needs.

“I'm concerned about people who have cultural and linguistic barriers. Having a disability doesn't limit you to your race or your intersectionality. I want to suggest that the community think about people who have disabilities that are visible and invisible and how stigmatizing it is to have a multitude of disabilities that there's not much of a way to support. I can speak English, but there are some of us who don't have the means because their first language is not English.”

“[People with disabilities need] to have an influential voice in making decisions affecting their lives. Not just a seat at the table, but to be acknowledged and truly seen - not invisible. “

“I want to speak to the fear of contradicting anything that comes from the regional center. My son is Latina. We're highly underrepresented [in SDP]. I have made a large attempt to participate in the regional center system to have my son's experience and voice be heard. Unfortunately, I haven't felt the embrace. I haven't felt cooperation or collaboration. I want to speak to the fear of retaliation, and what it looks like for my son. He's a non-speaker, so I really need to honor his experience.”

“We definitely need [to listen to people with] more lived experiences. We need more representation of people like me that will speak on behalf of my son and that have his best interest [in mind]. My son is a 25-year-old man that is going to need significant support from the system throughout his life. We have experienced everything.”

“[Self-advocate Self-Determination Advisory Committee members] are made to feel like their input is not valued by executive team members of the regional center, especially when they're raising systemic concerns and process issues. It speaks to a lack of cultural humility with respect to people with lived experiences. How do we make sure that that self-advocates who do open up and speak up about situations or bring problems to the SDAC are not being disrespected or made to feel like they don't amount to anything?”

PUBLIC RECOMMENDATIONS

- **Collaborate with community-based organizations that can support families and self-advocates on a cultural level.**

“I want to say that thank you very much for the job you are doing. It's amazing. We started enrolling in this program and yes, there's some bumps and a lot of nuances, but it's an amazing program. Thank you very much.”

-Town Hall Participant

INDEPENDENT FACILITATORS

Town Hall participants expressed that SDP participants must have access to high quality, well trained, and ethical Independent Facilitators (IFs). They emphasized that these qualities depend on IFs being paid well for their services.

“Independent Facilitators that are part of our community and have expertise in different areas based on client needs. IFs are our lifeline. We need to make sure they are paid well so the industry is welcoming to those who want to make a career out of it.”

“A few people have mentioned wanting a yelp-like resource and reviews. We are going through the SDP process for my 16-year-old daughter and spent the last two years developing a "yelp" for our community. We have a specific category for IF and FMS and we are a free resource so families and individuals can find, review and make lists of places to reach out to and favorites etc. www.theconnectedparent.net. We believe our directory and reviews allow more freedom and information when making choices.”

PUBLIC RECOMMENDATION:

- **Ensure that Independent Facilitators are provided with robust training and fair wages.**
- **Create and/or promote resources to help SDP participants locate quality support services.**

OTHER SUPPORT NEEDS

Town Hall participants also identified the following as areas where additional support is needed:

“Supported living services should be improved beyond insisting upon background checks for personal care assistants.”

“Accessing caregivers and transportation.”

“More exposure to friends and advocates for those that are not able to easily speak or read.”

“Support related to special Living Trust and CalABLE.”

“Michael’s life has transformed significantly due to access to SD. He has truly developed the story, budget and plan to support the way he wants live, and the needs required to support him in doing so. The process is an absolutely headache (and shouldn’t be this way) but when you come out on the other end it’s beautiful.”

-Town Hall Participant

Responsibility

What responsibilities accompany self-determination, and what helps or hinders people in meeting these responsibilities?

The Self-Determination Program requires that the consumer/family take on a number of responsibilities that are not required of them under the traditional service model. SSDAC Town Hall participants expressed that they understand how important it is that they, as the consumer, are fully and adequately informed so that they can fulfill their responsibilities.

“It is still unclear what liability is taken on by clients and what insurance we need to cover ourselves and what it takes to be an employer. We have not done this before and no one is available to guide us on how to be employers in California, employment laws, etc.”

“[There is a] lack of paperwork that is written in Plain language for clients to make their responsibilities as employers easier. [This is needed] if they have a difficult time reading and understanding various aspects of complex paperwork.”

PUBLIC RECOMMENDATIONS

- **Increase access to Plain Language resources/materials regarding the consumer’s responsibilities as employers.**
- **Provide additional training opportunities for consumers/families pertaining to their responsibilities as employers, regional center policies/processes, and how the SDP works.**

Authority

What authority should individuals have over their own lives? Where do they face unnecessary limits?

The Self-Determination Program promises consumers that they will have the authority to control their budget so that they can purchase the services and supports of their choosing. Town Hall participants expressed that consumers/families that receive services through the SDP must be able to exercise their authority over their budget and have responsive and trustworthy support in place for when help is needed.

INDIVIDUAL BUDGET/SPENDING PLAN DEVELOPMENT AND APPROVAL

Town Hall participants expressed that unnecessary limits are being placed on consumers as their budgets and spending plans are developed. These limits sometimes come from Financial Management Service providers placing restrictions, but the most prevalent concern that was expressed was about regional centers lacking an understanding of how to use a person-centered approach to developing budgets and approving spending plans.

“We are using still traditional models in the budget development phase. Although there is a person-centered plan in place, there are not person-centric approaches being used to develop the budget.”

“There has to be additional training [for regional centers]. I want to see a directive that talks about the regional centers trying to impose the POS standards on the spending plans. While they can use those standards to create the budget, they are also trying to use those standards on service codes that are not in the traditional system.”

“I echo everybody else's thoughts [about regional centers using] the traditional model as a baseline which even today, after so many years of SDP being in place, the case coordinators are not very familiar with how to actually bring uniqueness to the SDP for their clients.”

“Regional Center of Orange County micromanages the spending plans to the most ridiculous point. It completely removes the freedom aspect of self-determination and I've asked the ombudsperson office to address this in the past. Then we have GT independence who's micromanaging differently, so it's almost impossible to get a spending plan that Regional Center of Orange County and GT Independence both agree on.”

“The regional centers are working on a uniform IPP template. Let's do the same for the spending plan. I think this helps streamline and prevent barriers because it prevents delays in getting changes implemented. There are some amazing ones that some regional centers are using and there's some very non-practical ones that many regional centers are insisting on using. Oftentimes there's two templates being used concurrently because the FMS has to have theirs, and the regional center has to have theirs, causing more delays. It would be great if we could also see a uniform template.”

“FMS policies are restricting; participants cannot freely choose providers. Some RCs do not seem to know the SDP law.”
“The individual budget is where they sometimes have unnecessary limits. Service budgets are not always prepared for individuals unexpected expenses.”

PUBLIC RECOMMENDATIONS

- **Provide comprehensive budget and spending plan training for regional center/SDP department staff.**
- **Standardize a spending plan template.**
- **Release a directive that addresses regional centers imposing POS standards on SDP spending plans.**

ENFORCEMENT/CLARITY OF PROGRAM DIRECTIVES

The Department of Developmental Services continues to respond to identified issues within the Self-Determination Program by releasing timely directives. SSDAC Town Hall participants recognized the Department’s efforts to improve the program but expressed concerns about their enforcement. Participants emphasized the need to ensure that program directives are clearly communicated to all affected parties, include a timeline for implementation, and are enforced in a uniform manner.

“I want to talk about the directive released on December 26, 2023, that stated that the FMS needs to pay for local businesses in the manner that they are typically bill. Many of the FMSs are not doing that. I want to make sure that since this directive already exists that DDS is going to enforce that directive.”

“Regional Centers that do not clearly understand SDP rules and hide behind “we need to ask DDS.”

“The regional center seems to find directives more aspirational than mandatory. I'm wondering what plan there is to make it uniform with regard to a timeframe in which [regional centers] must adopt them, because we're getting pushback. I'll send a directive to my son's service provider and say ‘we'd like you to do X according to this directive,’ and they have this sort of nonchalant attitude about it. [They say] ‘well, we'll get to that’ or ‘I haven't seen that before, I'll consider it.’ I'm wondering if there's any way to make it a little bit teethier so that things can be uniform.”

PUBLIC RECOMMENDATIONS

- **Provide deadlines for implementing directives.**
- **Provide direct oversight/monitoring of the implementation of directives.**
- **Consider how each directive will change regional center procedures and have very clear direction for all users.**

“I am a parent of a 26-year-old Regional Center client and a former IF. Living in a rural county, SDP has been a lifesaver for my son. He did not have a day program for months due to staff shortages. With SDP, we were able to hire an amazing Direct Support Professional, who also serves two other individuals. My son has never been busier and is happy to head out each day.”

-Town Hall Participant

Confirmation

How can we ensure individuals feel acknowledged in their self-determination? What recognition and validation are most meaningful?

SSDAC Town Hall participants offered the following thoughts about how Self-Determination Program participants can be affirmed and recognized as the primary decision makers in their own lives:

“Having a team that is encouraging and happy to be working together and celebrating incremental improvements, not a team that seems to be looking for ways to limit what can be done in SDP. This includes the FMS, RC, IF, and Circle of Support.”

“Having needed support, being supported by people who enjoy working with the participant. Making progress on their goals, feeling good about themselves and about being allowed to make their own choices, and being supported by person-centered thinking staff.”

“Validation of their dreams and goals.”

“By recognizing the efforts they put into Self-Determination. They should be recognized for that constantly.”

“We can support individuals in feeling acknowledged in their self-determination by recognizing and authorizing their requests or wishes. If those wishes are not in line with regulations, we should offer guidance on how they can proceed to help them achieve their goals.”

“Making sure that people are safe and healthy and satisfied with their lives and doing what they want to do is essential to the success of the Self Determination Program.”

“My son requires two-on-one supports. before the self-determination program, he really didn't have the choice to receive that support at home. So that's been a huge life improvement for him, choice and freedom.”

-Town Hall Participant

February 19, 2025

**AGENDA ITEM 10.
INFORMATIONAL ITEM**

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

2025 Goals and Priorities

WIC 4685.8 states that the SSDAC will identify self-determination best practices, effective consumer and family training materials, implementation concerns, systemic issues, ways to enhance the program, and recommendations regarding the most effective method for participants to learn of individuals who are available to provide services and supports.

With this mandate in mind, the SSDAC set three priorities in February of 2022; the creation of a platform to share best practices, identifying trainings and/or provide feedback on trainings for Service Coordinators, and engaging in disparity outreach and/or developing an educational video targeted at ethnic disparities. Co-chairs Rick Wood and Nestor Nieves will review the status of these priorities and seek member feedback regarding the goals and priorities for 2025.

Attachments

SSDAC Priorities Detail Sheet

SSDAC AGENDA ITEM DETAIL SHEET

ISSUE: SSDAC Goals and Priorities

SUMMARY: To ensure that the SSDAC remains productive and engaged in projects to fulfill its statutory mandate, committee members will evaluate progress toward previously identified priorities and provide direction to the SSDAC Workgroup regarding goals and priorities for 2025.

BACKGROUND/ISSUES/ANALYSIS: WIC 4685.8 states that the SSDAC will identify self-determination best practices, effective consumer and family training materials, implementation concerns, systemic issues, ways to enhance the program, and recommendations regarding the most effective method for participants to learn of individuals who are available to provide services and supports.

With this mandate in mind, the SSDAC set three priorities in February of 2022; the creation of a platform to share best practices, identifying trainings and/or provide feedback on trainings for Service Coordinators, and engaging in disparity outreach and/or developing an educational video targeted at ethnic disparities.

PRIOR SSDAC ACTIVITY: In June of 2022 the SSDAC approved timelines and workplans for each of its priorities. Progress on each of these is outlined below:

SSDAC Best Practices Platform:

February 2023: members provided feedback on the best practice submission process and categories for the online platform.

April 2023: the SSDAC Best Practices Submission Form was distributed widely. The SSDAC Workgroup began reviewing submissions as they were received.

Current Status: The SSDAC Best Practices Platform is live and the SSDAC workgroup continues to review and approve content as needed. This project will be ongoing as best and promising practices are identified.

Service Coordinator Trainings:

November 2022: SCDD staff and workgroup members conducted outreach to regional centers to request Service Coordinator training information and materials.

April 2023: LVAC Members and Regional Center Participant Choices Specialists were encouraged to submit best and/or promising practices via the SSDAC Best Practices Submission Form.

Current Status: Despite these efforts, the SSDAC Workgroup has not received sufficient response to make informed recommendations regarding Service Coordinator trainings. Attempts to gather information and materials have been largely unsuccessful. In January 2025 the SSDAC Workgroup requested information from SSDAC members regarding their local SDAC's involvement in training service coordinators. This data can be found in the February 2025 Member Reports. Staff recommendation is to take this information to the SSDAC Workgroup to discuss next steps.

SSDAC Disparity Outreach:

June 2022: SSDAC members provided information about how their RC is addressing racial and ethnic disparities in SDP enrollment to evaluate promising practices and areas of need.

December 2022: Committee Chairs, SSDAC Workgroup and SCDD met several times Aug-Oct to draft a Disparities Project Proposal and identify a way that the SSDAC could apply for DDS funds through their equity grant process. It was determined that the SSDAC was unable to apply for funds through SCDD because SCDD was ineligible to receive funding through a DDS grant.

June 2023: the SSDAC delegated the development of a Disparities Workgroup to the SSDAC Workgroup.

Current Status: Because the SSDAC Co-Chair who was leading this project resigned from the committee, the Disparities Workgroup was put on hold. However, the SSDAC continues to evaluate effective outreach methods and has updated its Best Practices Platform to include effective strategies and materials. SSDAC members also provided feedback to DDS regarding training and outreach plan development for regional centers.

RECOMMENDATION: Direct the SSDAC Workgroup to assess next steps on providing service coordinator training recommendations and provide the Workgroup with feedback on goals and priorities for 2025 through participation in a committee developed survey.

PREPARED: Beth Hurn, February 7, 2025.

February 19, 2025

**AGENDA ITEM 11.
INFORMATIONAL ITEM**

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES – SSDAC

Public Comments

This item is for members of the public to provide comments and/or present information to this body on matters not listed on the agenda. There will be up to 20 minutes allocated to hear from the public with each person allotted up to 3 minutes to comment.