

**Lanterman Regional Center
Self-Determination Advisory Committee**

February 2, 2023
4:30pm-6:00pm

****Virtual Meeting****

Register in advance for this meeting/webinar:

https://us02web.zoom.us/webinar/register/WN_dayQ9nx6S5CvcKds-V-ZAg

After registering, you will receive a confirmation email containing information about joining the meeting/webinar.

AGENDA

- | | |
|--|----------------|
| 1. Welcome and Introductions | Pierre |
| 2. Approval of December 1, 2022 Minutes | Committee |
| 3. FDLRC SDP Updates | Adrian |
| a. Milestones Report as of January 2023 | |
| i. Forthcoming Revisions | |
| b. Allocation of SDAC Implementation Funds | Carmine |
| c. 099 Vendorization update | Carmine/Adrian |
| 4. DDS Updates (New Directives) | Carmine |
| 5. Review of Training Proposal from Phoenix Facilitation and Special Needs Network | |
| | Adrian/Carmine |
| 6. Report on the FDLRC SDP Support Group | Kristianna |
| 7. Review of Statewide SDAC Meeting | Pierre |
| 8. Further Discussion on Best Practices Subcommittee Proposals | Kristianna |
| 9. SDAC Governance — Election of a chair | Pierre |
| 10. Further Discussion on Bagley Keene/Return to In-Person Meetings | Melinda |
| 11. Public Input | Attendees |
| 12. Adjourn | Pierre |

SELF-DETERMINATION ADVISORY COMMITTEE

December 1, 2022

MINUTES

PRESENT

Pierre Landry, Chair
Lia Cervantez-Lerma, SCDD
Jamie Cha-McGrath
Karla Garcia-Diaz
Lareka Killebrew
Howard McBroom
Kristianna Moralls
Boanerges Rodriguez, DRC

NOT PRESENT

Mariko Magami
Michelle Wolf

STAFF

Adrian Jimenez
Carmine Manicone
Stephanie Ruiz
Melinda Sullivan

GUESTS

Various Guests from the Public

CALL TO ORDER

Mr. Landry called the meeting to order at 4:35 PM. The meeting was held via Zoom.

INTRODUCTIONS

- Committee members made introductions.
- Ms. Christine Tolbert, State Council on Developmental Disabilities (SCDD), introduced herself and provided an update on the SDP Orientation Training provided by the SCDD.

APPROVAL OF MINUTES

Ms. Moralls move to approve the minutes of October 6, 2022, Mr. McBroom seconded the motion, and it passed unanimously.

FDLRC SDP UPDATES

Mr. Jimenez reported on the self-determination program client/participants activity as follows:

- Total number of clients interested in SDP = 244
- Total number of clients enrolled in SDP = 136

REPORT ON THE FDLRC SUPPORT GROUP

Ms. Moralls reported that Carmen Jimenez-Wynn, Employment Specialist, was the speaker at the recent support group meeting. The information was well received.

DISCUSSION ON DDS DIRECTIVE: INITIAL PERSON CENTERED PLAN AND PRE-ENROLLMENT TRANSITION SUPPORTS GUIDANCE

Ms. Moralls and Mr. Landry presented a draft communication to Nancy Bargmann, Director of DDS, regarding concerns about July 28, 2022 Self-Determination Program Directive. The Committee discussed the draft and were in support of sending it.

Ms. Moralls moved to send the communication to DDS, Mr. McBroom seconded the motion, and it passed unanimously.

PROPOSAL FOR BEST PRACTICES SUB-COMMITTEE

Mr. Landry and Ms. Moralls proposed the development of a Best Practices Sub-Committee. After discussion, the Committee was in support of the concept. Mr. Landry will put together a list of proposals that can be discussed at the next meeting.

ALLOCATION OF SDAC IMPLEMENTATION FUNDS

Mr. Landry reminded the Committee that the Center has received funding to support implementation of the Self-Determination Program for FY 2022-23. The Committee discussed providing interpretation services to assist Independent Facilitators working with a monolingual SDP participant through the entire transition process. Discussion will continue at the next meeting.

SDAC MEETING DATES FOR 2023

- February 2, 2023
- March – DARK
- April 6, 2023
- May – DARK
- June 1, 2023
- July – DARK
- August 3, 2023
- September – DARK
- October 5, 2023
- November – DARK
- December 7, 2023

PUBLIC INPUT

SCDD Trainings:

Ms. Cervantes-Lerma announced that the State Council on Developmental Disabilities is conducting statewide trainings on various topics throughout the year. A flyer was distributed to the Committee.

ADJOURNMENT

The meeting was adjourned at 6:25 PM.

/fl

Lanterman Regional Center Self Determination Advisory Committee (SDAC)

Virtual Meeting
open to the
public (First
Thursday of
Every Other
Month)



Please join us on:

Thursday, 02/02/23
4:30pm-6:00pm

To view upcoming meetings
information, agendas and more visit:

lanterman.org/sdacmeeting

or

Contact: Frank Lara at 213.252.4902 or
flara@lanterman.org



Freedom
Authority
Support
Responsibility
Confirmation



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Lanterman Regional Center

Self-Determination Milestones

Progress Report

February 2, 2023

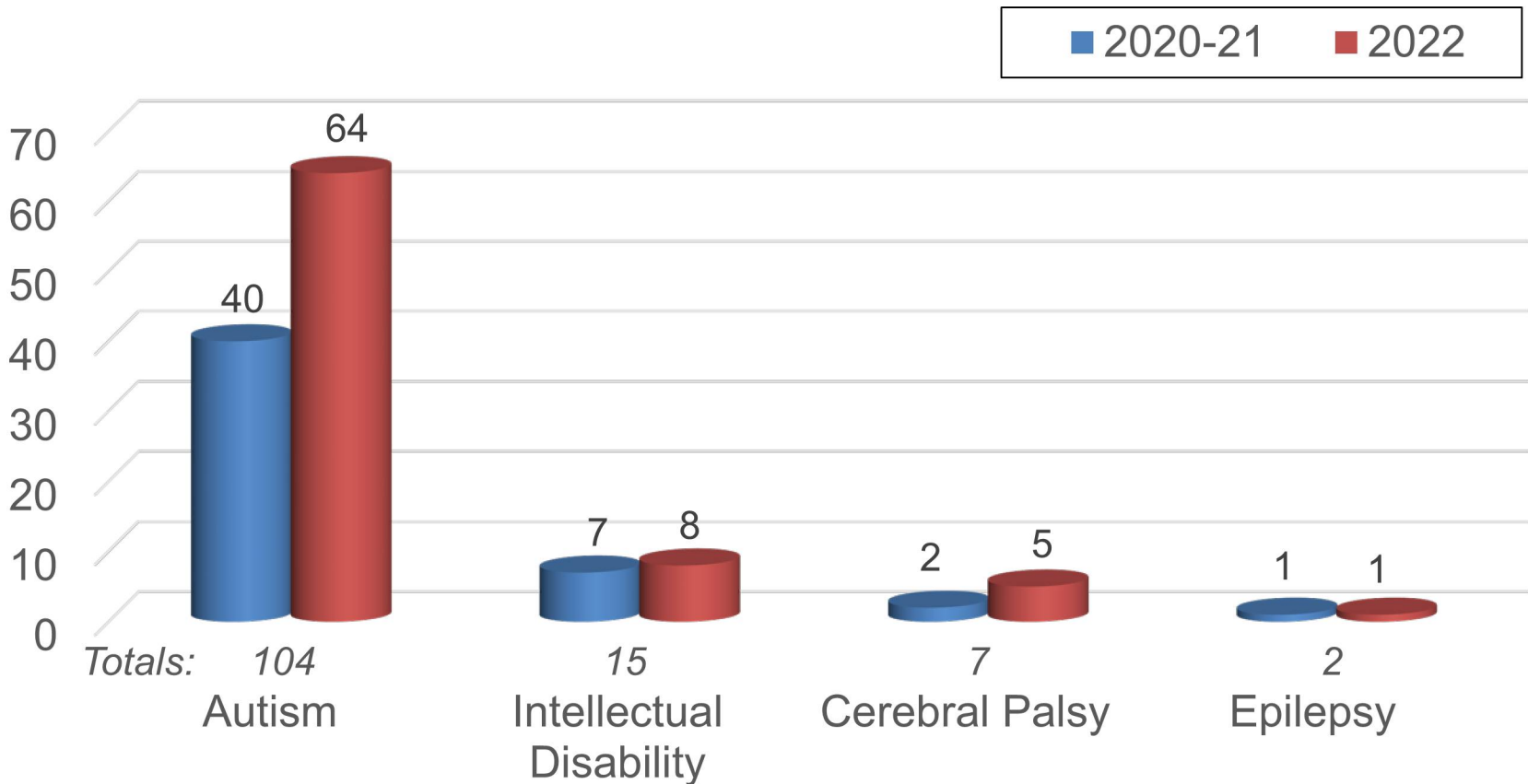
Sample

A total of 128 clients have fully transitioned into SDP as of January 1, 2023.

- 50 clients transitioned into SDP in the years 2020-21
 - Includes 28 clients from the implementation phase
- 78 clients transitioned into SDP in the year 2022, including 8 clients whose final transition date was January 1, 2023

Demographics

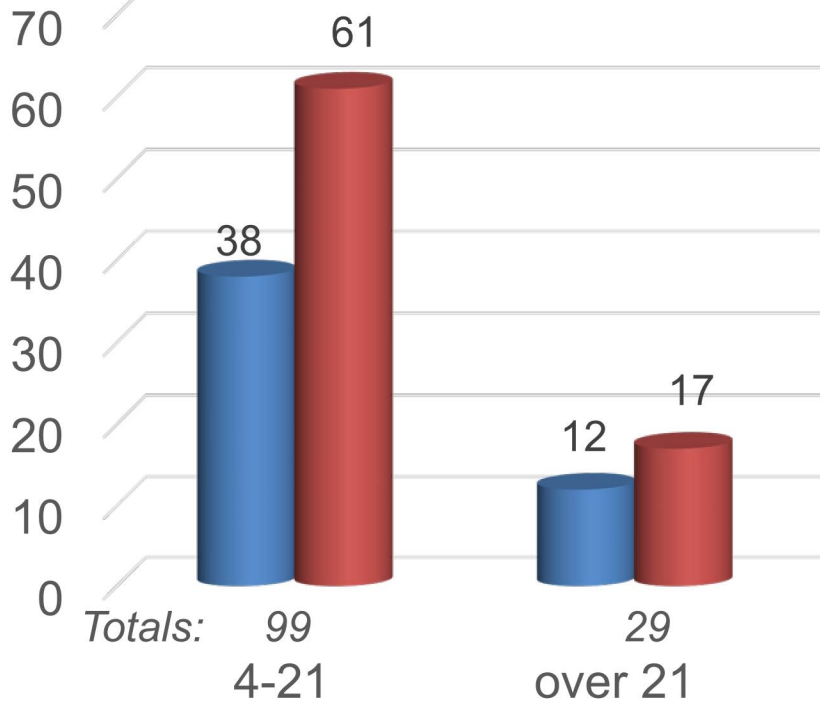
Primary Diagnosis



Demographics

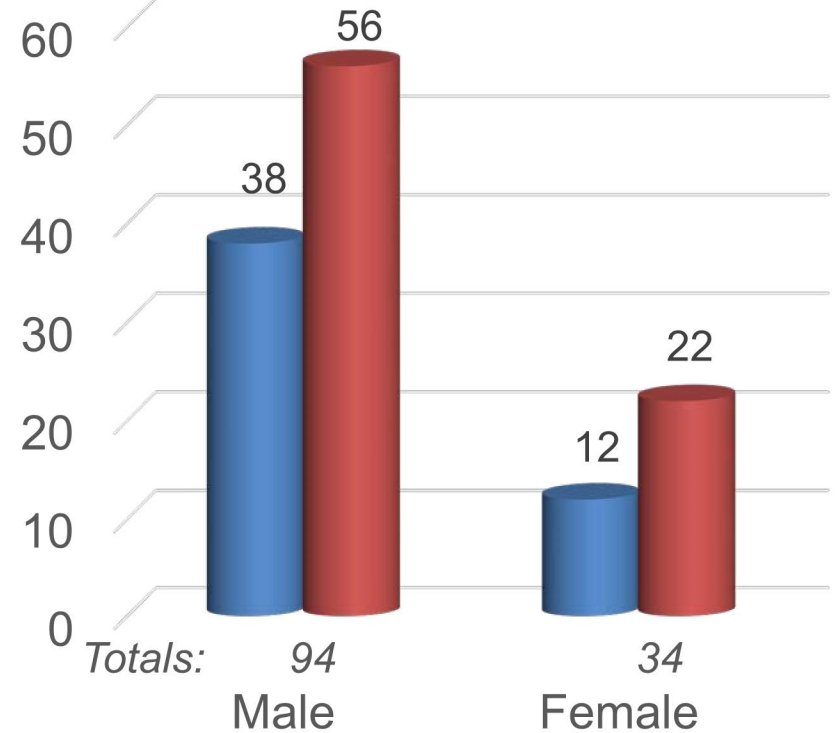
Years of Age

■ 2020-21 ■ 2022



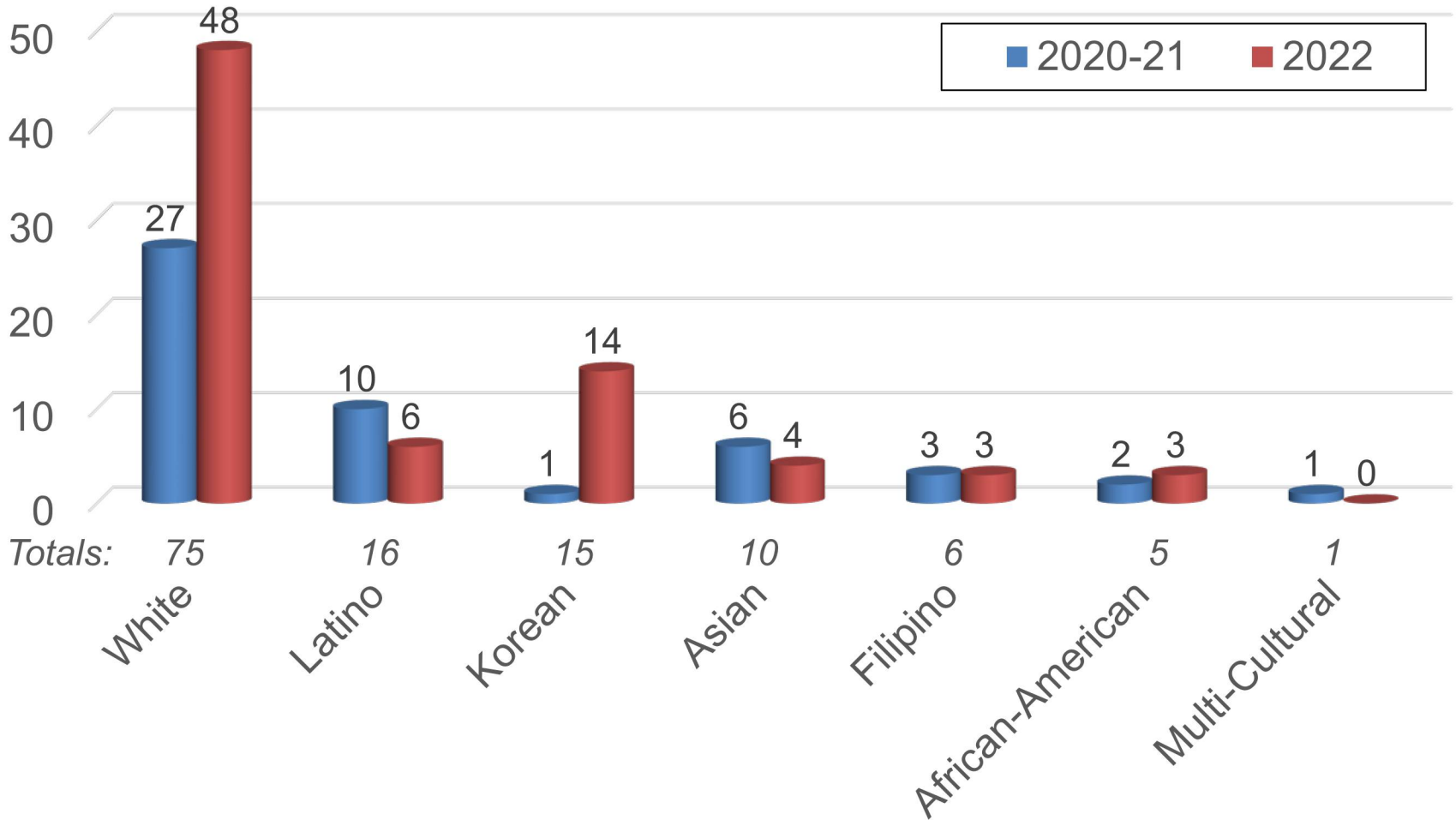
Gender

■ 2020-21 ■ 2022



Demographics

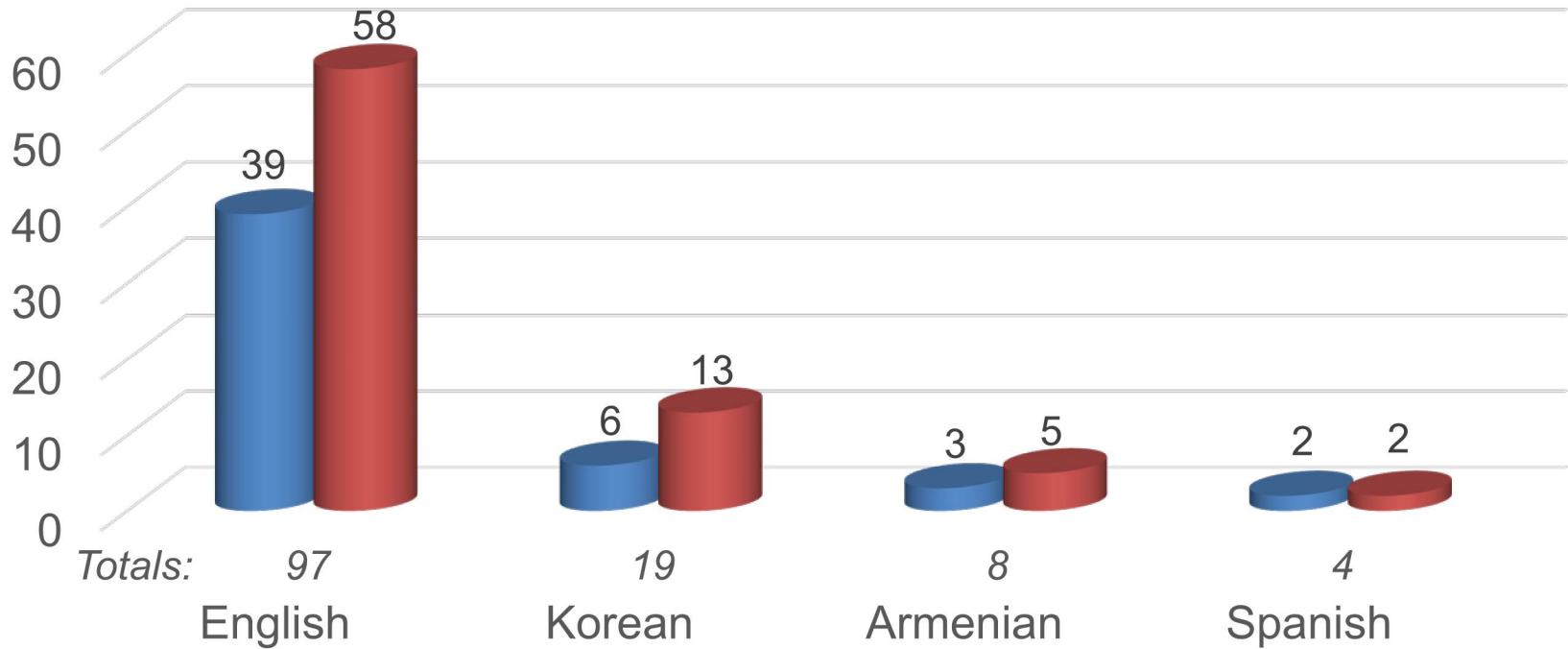
Ethnicity



Demographics

Language

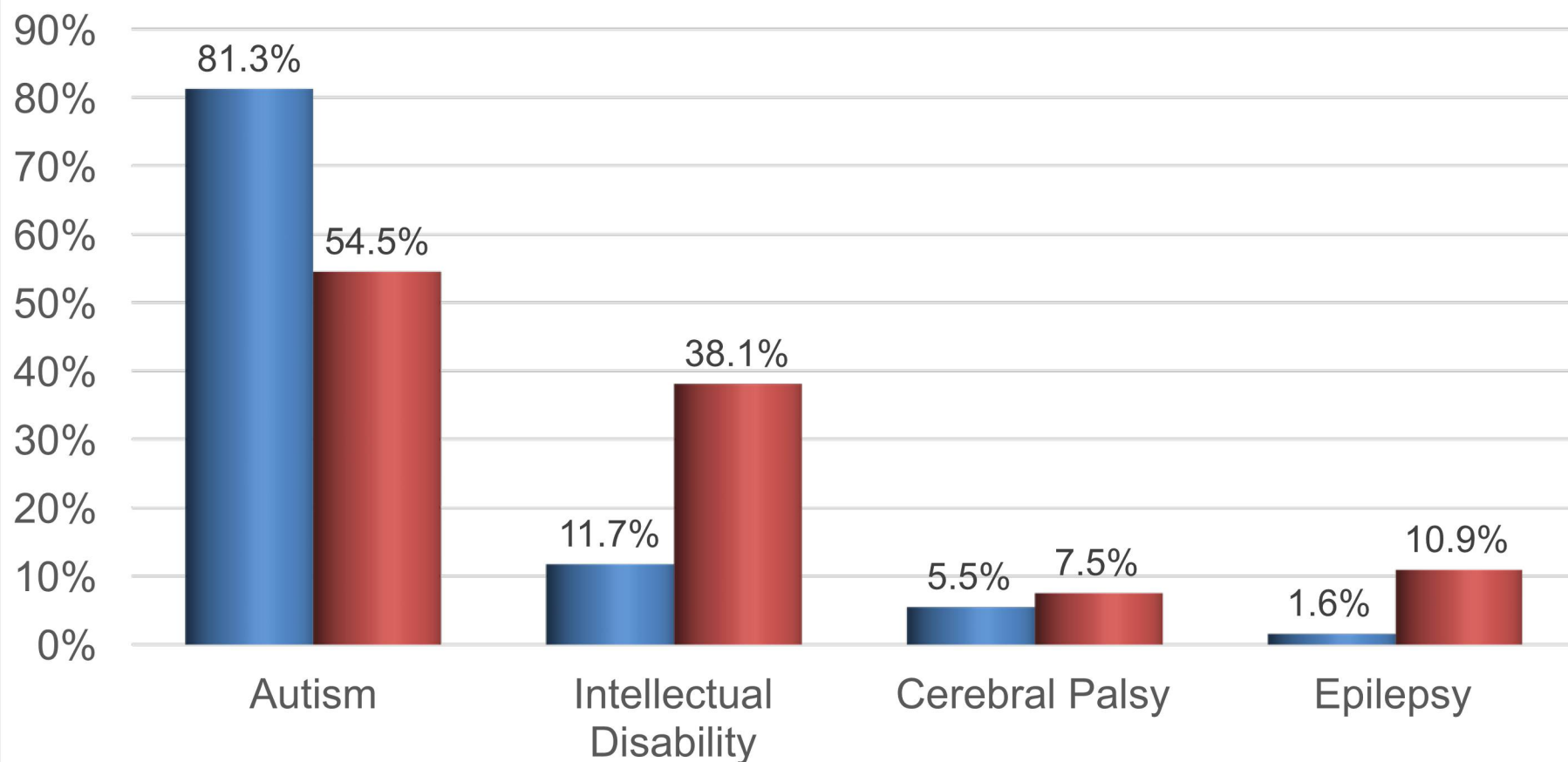
■ 2020-21 ■ 2022



Diagnoses of Clients in the Self-Determination Program Compared to all Regional Center Clients Over 3 Years Old

■ SDP (n = 128)

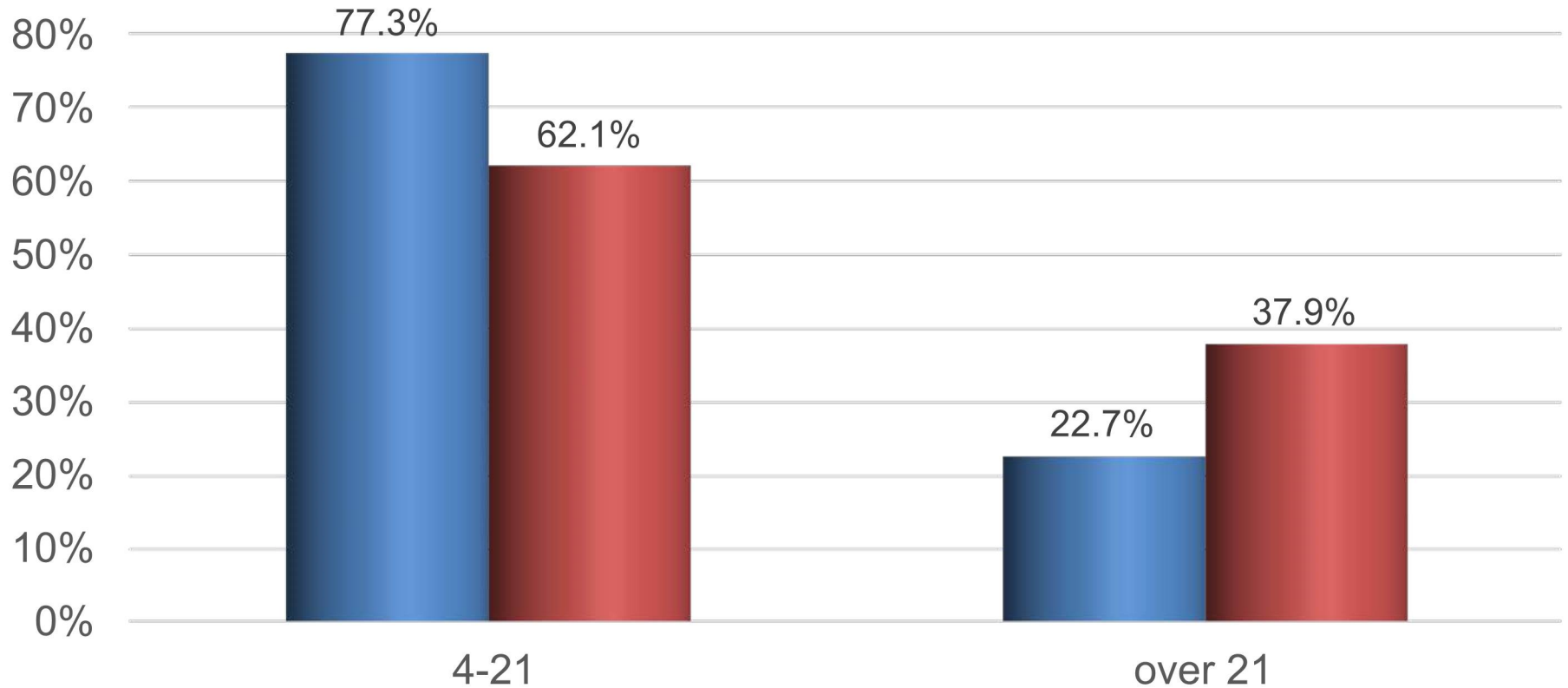
■ all RC (n = 10746)



Age of Clients in the Self-Determination Program Compared to all Regional Center Clients Over 3 Years Old

■ SDP (n = 128)

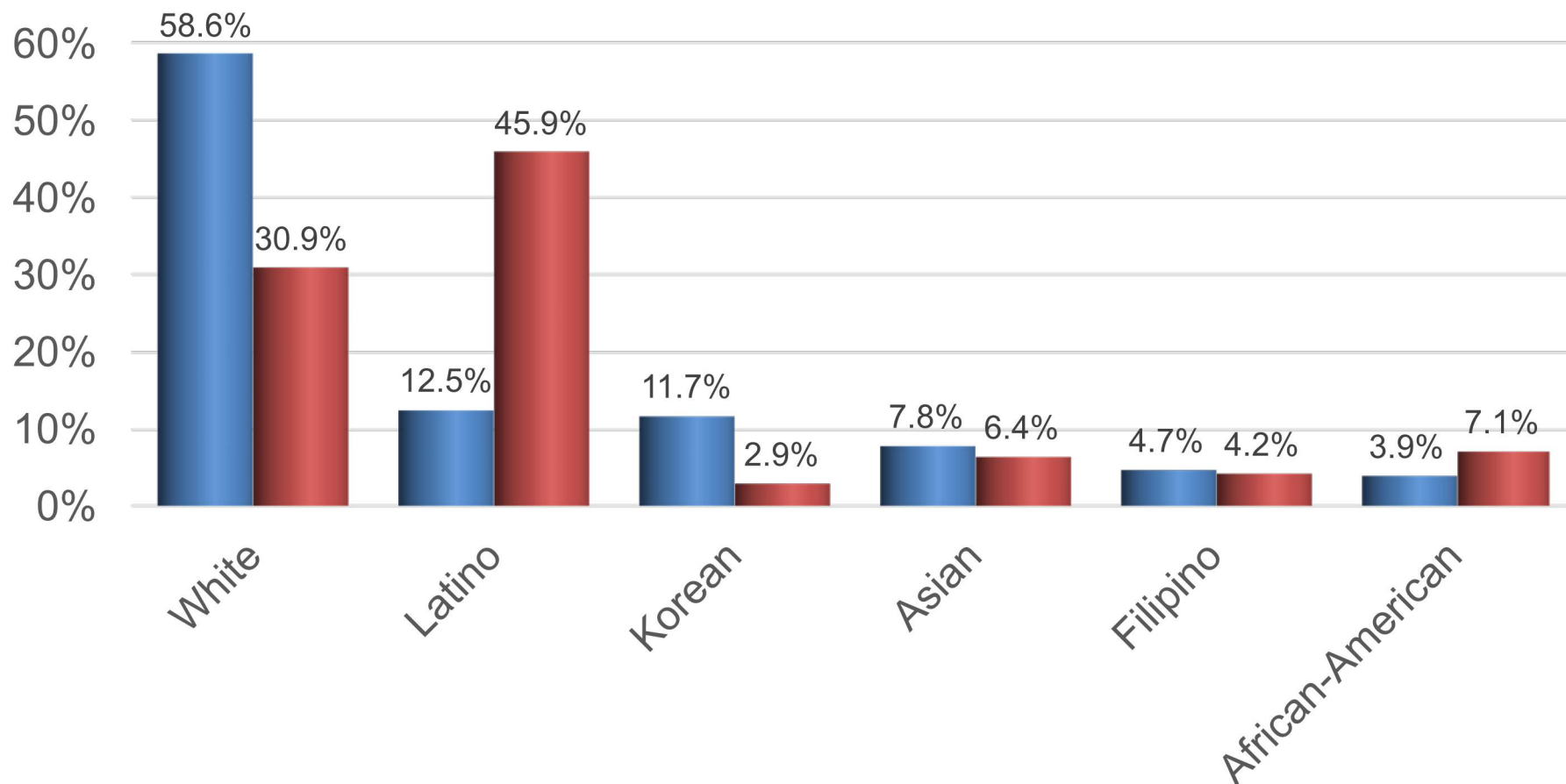
■ all RC (n = 10746)



Ethnicity of Clients in the Self-Determination Program Compared to all Regional Center Clients Over 3 Years Old

■ SDP (n = 128)

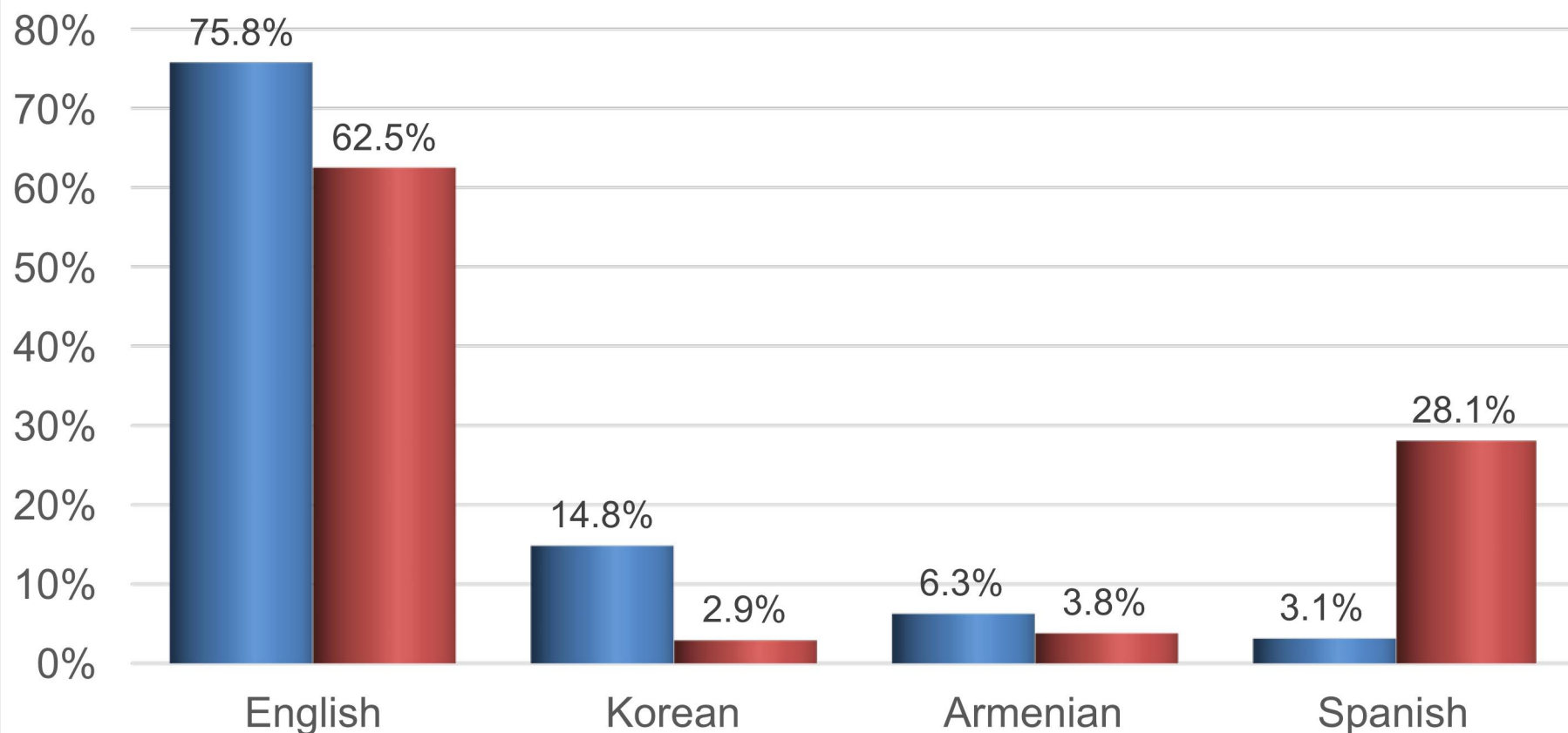
■ all RC (n = 10746)



Language of Clients in the Self-Determination Program Compared to all Regional Center Clients Over 3 Years Old

■ SDP (n = 128)

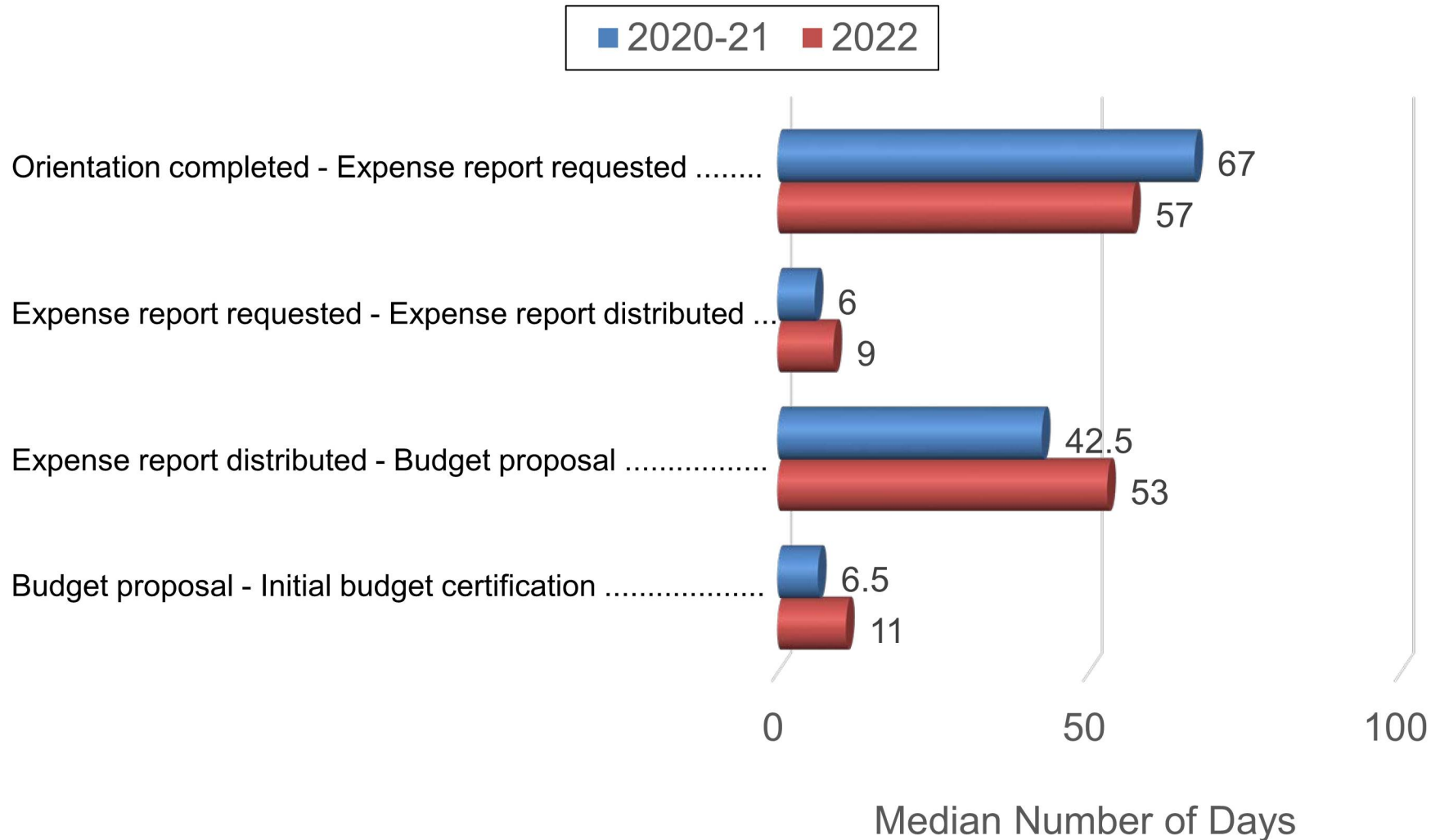
■ all RC (n = 10746)



The Self-Determination Process for All Families

- There are **8** milestones in the Self-Determination process from Orientation to Full transition into SDP
- The next chart shows you the 4 time intervals between each milestone in the **1st half** of the Self-Determination process

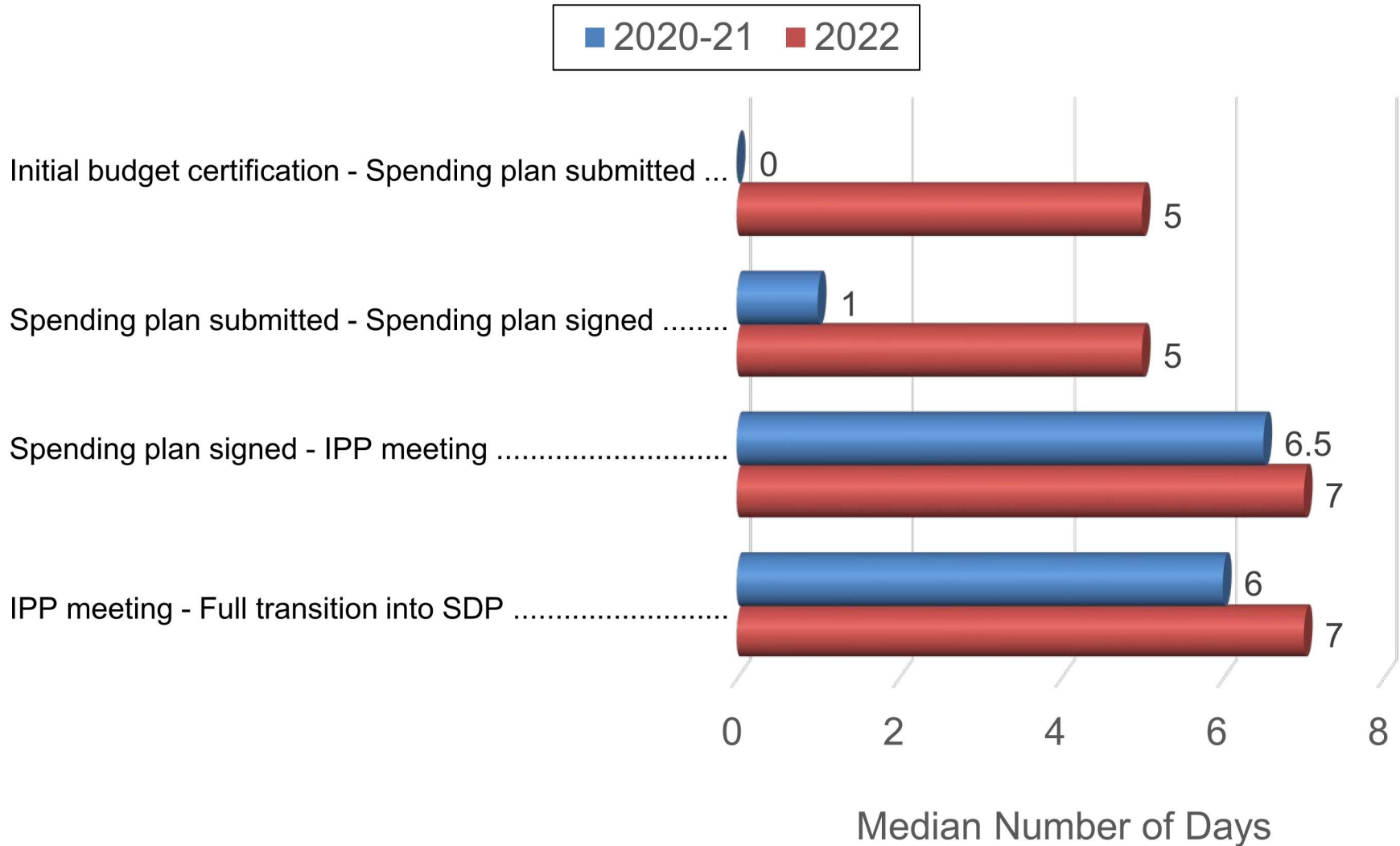
Time Intervals Between First 4 SDP Milestones



The Self-Determination Process for All Families

- The next chart shows you the 4 time intervals between each milestone in the **2nd half** of the Self-Determination process

Time Intervals Between Last 4 SDP Milestones



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DEPARTMENT OF DEVELOPMENTAL SERVICES

1215 O Street, MS 9-90
Sacramento, CA 95814
TTY: 711
(833) 421-0061



December 30, 2022

TO: REGIONAL CENTER EXECUTIVE DIRECTORS

SUBJECT: SELF-DETERMINATION PROGRAM: CONTINUING THE INDIVIDUAL BUDGET AND SPENDING PLAN

In alignment with the key principles of the Self-Determination Program (SDP), participants have the authority to control a certain amount of money to purchase needed goods and services through their individual budget. Individual planning teams have a shared responsibility to collaboratively develop and approve individual budgets and review spending plans for the subsequent year before the end of the participant's current budget year. During this process there may be disagreement about the budget and/or services. This correspondence provides guidance to regional centers for ensuring a participant continues to have access to the goods and services needed to implement their individual program plan (IPP).

Similar to an individual receiving services through the traditional system, regional centers have a responsibility to ensure the continuity of services necessary to implement an SDP participant's IPP. In SDP, this includes any time period in which an enrolled participant does not have a certified budget and/or current spending plan. Pending completion of a new budget and spending plan, a regional center shall continue services through any process that achieves this outcome, including:

- If the SDP participant has not exhausted the individual budget funds needed to continue implementing their IPP, extension of the end date of the current budget and spending plan.
- Continuation of the budget and spending plan from the previous year as a new purchase of service authorization, removing any one-time expenditures.

Regional centers shall notify the Financial Management Services provider about how the individual budget and spending plan will be extended pending the completion of a budget and spending plan at least 14 days prior to the end of the current budget year. The new budget and spending plan shall be completed no later than 60 days following the end date of the previous budget year, or a Notice of Action shall be issued. A Notice of Action may also be issued at any other time there is not mutual consent with a decision. A participant who timely files an appeal will continue to have access to the last agreed upon individual budget, minus one-time expenditures during the appeal process. The start date of the new budget cycle will be agreed to by the individual planning team.

“Building Partnerships, Supporting Choices”

Regional Center Executive Directors

Page two

Consumers, family members, or providers should contact their local regional center with questions regarding this correspondence.

Sincerely,

VICKI L. SMITH, Ph.D.
Deputy Director
Policy and Program Development Division

cc: Regional Center Administrators
Regional Center Directors of Consumer Services
Regional Center Community Services Directors
Association of Regional Center Agencies
State Council on Developmental Disabilities
Nancy Bargmann, Department of Developmental Services
Brian Winfield, Department of Developmental Services
Carla Castañeda, Department of Developmental Services
Jim Knight, Department of Developmental Services
Ernie Cruz, Department of Developmental Services
Suzy Requarth, Department of Developmental Services

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Naomi Hagel, M.S. / Founder
811 North Catalina Avenue, Suite 2018
Redondo Beach, CA, 90277
310.863.7977 / Naomi@GoPhoenix.org

Self-Determination Program (SDP) Proposal Support/Coaching for Transition to SDP

Summary of Project

Phoenix Facilitation proposes to support the implementation of the SDP at Frank D. Lanterman Regional Center (FDLRC.) With a combined total of over 100 years of experience with people with developmental disabilities throughout the lifespan, both lived and career-based, the team assembled for this project has the ability and desire to meet the needs of the diverse community of FDLRC. Phoenix Facilitation's team is made up of subject matter experts and parent and vendor advocates that aim to provide culturally and linguistically appropriate transitional services and training to further the overall reach of SDP and Person-Centered Regional Center services at FDLRC.

The outreach and support initiatives will be provided in a variety of modalities and languages in order to ensure access to the broader community and to decrease roadblocks and hindrances to engagement that could be caused by factors such as limited technology access, geographic location, need for multilingual services, and/or time and schedule constraints. Phoenix Facilitation's team is mobile, with the ability to travel throughout FDLRC's catchment area and/or utilize existing FDLRC office space (if permitted and preferred by a participant and/or family), as well as public or private meeting spaces, in order to quite literally meet a participant and/or family "where they are." The team will provide services in-person, via Zoom, by telephone, or through a combination of techniques, depending on a participant or family's specific needs and preferences.

Furthermore, the Phoenix Facilitation team is also willing and able to go beyond individualized coaching to only families and participants, and also focus on other areas outlined in the directives from the Department of Developmental Services (DDS), including joint training for participants, families, Regional Centers, Local Volunteer Advisory Committee members, and others, assistance with spending plan development, Orientation Support, collaborative groups and workgroups, and additional identified needs. Phoenix Facilitation aims to meet these other areas of need via outreach and connections (including with historically underserved groups) and family and provider partner (traditional vendors) group trainings. This will ensure greater reach of the SDP and associated services (thereby better meeting needs and reducing disparities), allow for FDLRC to better manage SDP cases moving forward, long-term, and sustainably, and build an SDP Community of Practice that will widen the Circle of Support for engaged participants. It is expected that this infrastructure will allow for overall better outcomes and additional supports for individuals and families that may have been previously isolated due to disability and/or language needs.

Scope of Services

Individualized Coaching: Phoenix Facilitation will receive referrals from FDLRC staff, as well as self-referrals, of participants who have completed the orientation for Self-Determination, but not yet moved forward with other steps in the process. Referrals will be processed at a designated email address (i.e. fdlrc@gophoenix.org) and through a specific referral form/template available in all threshold languages that will capture critical information about the participant, including name, Unique Client Identifier (UCI) number, date of birth, preferred language, best contact information, and preferences regarding service location. The same email

address will also remain available to participants and families ongoing to provide an option for communicating questions or concerns even outside of the specific coaching process. Participants who self-refer will be assisted to contact their Service Coordinator and notify them of their interest in coaching prior to coaching services commencing, which will also ensure that the potential participants have completed the required orientation.

To ensure widespread knowledge of the coaching availability, Phoenix Facilitation will request that FDLRC and/or the Local Advisory Committee advertise this in the following areas, as well via as any other methods they may find appropriate, and in all targeted languages:

- “All Staff” emails to alert Service Coordinators and managers, as well as notification at departmental meetings for case management staff.
- Self-Determination Local Advisory Committee Meetings, Client Advisory Committee Meetings, and Board of Directors Meetings.
- FDLRC’s website (including but not limited to the SDP portion, as potentially interested participants may not navigate to that specific area)
- FDLRC’s social media (including Facebook, Instagram, etc., in multiple languages as needed)
- The Statewide SDP Forum run by the State Council for Developmental Disabilities and found at <https://www.facebook.com/CA.SDP.Forum>

Upon receiving a referral and confirming coaching eligibility with FDLRC representatives, Phoenix Facilitation will assign the participant/family to an appropriate coach/parent partner within two (2) business days, taking into account language and cultural needs and specifications, location, desires regarding services (i.e. remote or in-person), availability of coaches, etc. Within five (5) business days of assignment, a coach will then reach out to the participant/family via their preferred contact method to inquire about their specific needs and set up a plan to move forward. Upon assignment to a coach, the referring Service Coordinator will be notified of the specific partnership and provided the coach’s contact information, as well as a signed Release of Information from the participant or legal guardian/conservator, to facilitate engagement and connection as needed.

Each participant/family’s services will be individualized, based on where in the process they are and what they are requesting assistance with. Coaching services may include, but are not limited to, the following:

- Educating participants and families about the role of various service providers, the process of transitioning to SDP, what services may be available through generic supports and/or the Regional Center, the general expectations a participant will need to abide by in order to be successful in the program, and their rights throughout the process.
- Assisting coaching participants to find, contact, interview, and ultimately choose reputable, qualified, competent, and culturally and linguistically appropriate and accessible Person-Centered Planners, Independent Facilitators, and/or Financial Management Service (FMS) Providers.
- If participants and families are unable or uninterested in completing an outside Person-Centered Plan even after explanation of benefits, Phoenix Facilitation’s team will be complete a “one page profile” with the participant, as well as a review of the previous year’s Individual Program Plan (IPP) and 12-months’ expenditure report to identify unmet needs and changes in circumstances that would need to be considered in budgetary development with the Regional Center team.
- Advocacy for timely movement through the various stages at the Regional Center level via communication regarding completion of different steps and any barriers that are being experienced to key Regional Center staff member contacts. This is to include advocacy for prompt payment of Person-Centered Planning invoices.
- Answering questions and addressing general concerns throughout the transitional process.

Each coaching program participant will be contacted a minimum of two (2) times monthly (unless they request to be contacted less often) to determine what progress has been made, provide assistance as

needed, and evaluate and problem-solve any challenges that may arise during the process. Contact may be made more often, depending on whether the participant or family member requests additional support or “check-ins.” Phoenix Facilitation will track all contact attempts and work completed for coaching program participants, including connections with case management staff from FDLRC, on a spreadsheet that will be updated and shared with FDLRC no less than one time per month; any identified staff or case-specific concerns that require intervention beyond a Service Coordinator will also be reported to key Regional Center staff within 48 hours. During FDLRC meetings, Phoenix Facilitation will also report on aggregated barriers and other trends noted, including data related to ethnicity, age, language preference, and other demographics of participants, while maintaining confidentiality, in order to assist the Local Advisory Committee and Regional Center to advance the program, address systemic issues, and provide better overall supports.

To avoid a conflict of interest, Phoenix Facilitation will not complete full Person-Centered Plans, nor advocacy directly on behalf of a participant or family enrolled in the coaching program. Phoenix Facilitation will agree to be an individual or family’s Independent Facilitator only upon request by a participant or family member and only after transition to Self-Determination has been fully completed. Phoenix Facilitation will not directly advertise the availability of their own Independent Facilitation services to a participant or family enrolled in the coaching program and will instead provide referrals to known, trusted resources.

Total Cost: \$100.00 per hour for services provided in English

\$125.00 per hour for services provided in Spanish

\$150.00 per hour for services provided in other languages (i.e. Korean, Mandarin, etc.)

Up to \$45,000 total over a 12-month period.

Outreach: Statewide, despite numerous efforts over the years, a common complaint remains that individuals and families are unaware of what services are available through the Regional Center system, and even the existence of the SDP itself. This is particularly pervasive in minority communities that are disproportionately impacted by disparities in service delivery, and has been exacerbated in the last three years due to the COVID-19 pandemic causing increased reliance on technology that not all individuals served by Regional Centers have access to. Phoenix Facilitation aims to address some of these systemic barriers to service access via not only some of the widespread and multilingual communications discussed above and below, but also targeted outreach to the deaf and hard of hearing/American Sign Language (ASL) utilizing, Chinese/Mandarin-speaking, Korean, Black/African- American, Hispanic and Spanish-speaking, and self-advocate communities, among others. Phoenix Facilitation proposes the following:

1. Connection with Korean-speaking, Chinese/Mandarin-speaking, Black, Hispanic, and Spanish-speaking parent/support groups, among others as necessary, to provide brief informational/question and answer sessions regarding SDP, which would be presented in the language of choice and without translation services whenever possible, in order to increase overall interest in the program.
 - a. If enough interest was gathered, Phoenix Facilitation could coordinate with FDLRC staff to conduct at least one orientation in Korean, Mandarin, and/or Spanish, as needed, without translation services, to be more accessible to these specific communities. In addition, Phoenix Facilitation’s team could support with orientations that had ASL translation available, with support from FDLRC to secure and fund for ASL translation.
2. Development of a “mass mailing” in all threshold languages to all individuals at FDLRC who are “status 2” (Lanterman services eligible) with a brief explanation of Self-Determination services

and a list of upcoming orientations. This will also serve to reach more-recently eligible clients of FDLRC, who may not have been touched by previous efforts, and particularly those in the Early Start program who may not realize they are eligible for this service delivery system.

- a. Multilingual flyers prepared for this purpose will also be available for social media advertisements, provision to parent/support groups, and other outreach.
3. Monthly, linguistically diverse, advertisement of the Self-Determination Local Advisory Committee meetings via FDLRC's social media accounts and the aforementioned Statewide SDP Forum Facebook page, which will also enhance community participation and feedback in public meetings.
 - a. An "interest list" of individuals and families whom have attended orientation and/or expressed interest in learning more about the program may also be maintained by FDLRC and/or Phoenix Facilitation staff in order to provide notification/reminders of these meetings. In addition, a simple and visible manner of joining the Self-Determination Email List at FDLRC for interested stakeholders is suggested.
 - b. Translation services to any appropriate languages, including but not limited to American Sign Language (ASL), Mandarin, and/or Korean, among others, in addition to the currently-provided Spanish, may be necessary if outreach is successful
4. Outreach and presentation to the FDLRC Client Advisory Committee, as well as interested provider partners/vendors who work with individuals served (i.e. employment services), in order to connect with self-advocates and support them through the Self-Determination Process (including via connection to the aforementioned coaching program and through staff members who identify as self-advocates themselves.) "High functioning" self-advocates are often ironically underserved by the Regional Center system and traditional services that do not address their unique needs. The SDP provides an opportunity to creatively provide support. However, many self-advocates who do not have significant family support have not yet been able to access the SDP. In targeting this group, Phoenix Facilitation will provide plain-language information and guidance to allow potential participants to make informed choices about what type of service delivery they would like to engage in, and to follow through with the process as needed.
 - a. If enough interest was garnered, Phoenix Facilitation could coordinate with FDLRC staff to utilize the plain-language orientation previously created by the State Council for Developmental Disabilities and conduct a specific orientation aimed at self-advocates.
5. Phoenix Facilitation will make available an email address and phone number (with text message capabilities) to participants and families to communicate directly with Phoenix Facilitation's team, ask questions, etc., and will respond to all outreach attempts to this phone number and email address within three (3) business days.

Total Cost: \$10,000 over a 12-month period.

Family Training: A frequently reported barrier to moving forward with Self-Determination after orientation is completed is a misunderstanding of next steps and how to navigate the process. While the coaching program will address some of these needs, making available a brief, group, training series on Self-Determination that goes into more depth on specific topics than the orientation also gives participants and families the opportunity to enhance their Circles of Support by meeting and engaging with others in similar situations. This group training series, if advertised and made open to the greater community, also allows for increased connection to the Regional Center and SDP by participants and families who may not otherwise be "touched" by the scope of this proposal. In practice at South Central Los Angeles Regional Center (SCLARC), where this modality has previously been practiced by staff, this led to greater interest in the SDP from those who previously did not want to commit to the full orientation but were curious, as well as those who had been unable to attend orientations. Concerns and questions raised at these sessions, while not always related to Self-Determination, also emphasized the importance of a "safe space" for the community to gather and receive reliable information. Simultaneously, key Regional Center staff, once

notified, were able to problem-solve and remove barriers to accessing services, regardless of service delivery modality, which has the potential to reduce disparities in service delivery.

Phoenix Facilitation proposes four trainings be held via Zoom and advertised via the aforementioned social media and other channels. Separate training sessions will be held in English and Spanish, in order to maximize culturally sensitive outreach and minimize confusion inadvertently caused by translation services; ASL will be available at English-speaking sessions (with support from FDLRC to provide and fund for ASL translators), and translation services may be provided for additional languages upon request. Two-hour long training sessions will be held over a period of two months, including over weekends, and recordings and materials will be made available to the community and FDLRC after the completion of each training. FDLRC will specifically receive copies of the training materials, including versions that they can edit and continue to use ongoing after the termination of the contract.

FDLRC's Self-Determination Website and Local Volunteer Advisory Committee meetings, orientations, and coaching program will be publicized during the trainings and case-specific concerns will be reported to key Regional Center staff within 48 hours of trainings being completed. Metrics regarding the trainings, including data regarding the number of individuals registered compared to the number attended, as well as responses to Zoom polling regarding questions and information as applicable, will be reported to FDLRC and the Local Advisory Committee to evaluate efficacy and reach of the training sessions.

A proposed training outline is detailed below, but can be amended based on the preferences and needs reported by the Local Advisory Committee and/or Regional Center.

1. Path to Self-Determination Services
2. Person-Centered Planning & Independent Facilitation
3. Budget & Spending Plan
4. Financial Management Services & Service Implementation

Total Cost: \$7,000 over a two-month period

Vendor Training: Among the strongest advocates for the disability community as a whole are the provider partners and vendors who have supported individuals served by Regional Centers for many years. However, throughout this community, there is also widespread misinformation and distrust of Self-Determination and Person-Centered Planning, with many providers concerned that Self-Determination will prevent them from serving as many individuals and lead to a potentially crippling loss of revenue. Through connection with FDLRC's Vendor Advisory Committee (VAC), Phoenix Facilitation proposes to provide a training to this community regarding the SDP. During this training, common myths will be dispelled, questions will be answered, and the ways in which Self-Determination could allow vendors to enhance their services will be promoted. This will include a discussion regarding the requirements and impact of the Home and Community Based Services (HCBS) Final Rule requirements that are immediately impactful to Self-Determination services even while they remain pending in traditional services.

It is hoped that by increasing the capacity of this critical community regarding Self-Determination, it will also serve to indirectly outreach to individuals and families served, whom typically have much more frequent contact with the vendors that serve them than their Service Coordinators. As such, these vendors may not only have invaluable relationships but also be acutely aware of their needs and individuals who could benefit from Self-Determination in a way that the Regional Center itself is not. In addition, Phoenix Facilitation will work to pique vendor interest in Person-Centered Planning and Independent Facilitation services, which will allow for an increase in local, high-quality, services of these types that are consistent with the demographics of FDLRC as a whole. This is particularly critical and relevant at this time, as 099/General Self-Directed Supports vendorizations are a high priority for Regional Centers, who are required to recruit providers for this service.

Total Cost: \$3,000 for a one-time training, with materials disseminated afterwards; to include pre-meeting with FDLRC representatives to ensure consistency and agreement regarding information

presented.

About Phoenix Facilitation's Qualifications

Phoenix Facilitation was founded by **Naomi Hagel**, who holds a Master's Degree in Mental Health Counseling and is a Credentialed Person-Centered Thinking Trainer via The Learning Community for Person-Centered Practices. She recently received training in the Self-Determined Learning Model of Instruction (SDLMI) via the University of California, Los Angeles (UCLA) and has previously studied the Liberty Plan model of Person-Centered Planning. Her passion lies in ensuring that all individuals with developmental disabilities have their rights respected and can access all services they are entitled to through generic and Regional Center funded sources. Naomi has a particular interest in working with historically underserved communities and those impacted by disparities in service delivery, as well as working with self-advocates, and takes pride in her knowledge of the Lanterman Act and Self-Determination. She looks forward to working with her team, whose qualifications and specialties are explained in more detail below. They were personally selected for this specific project to best meet the needs of the FDLRC community. It is Naomi's hope that continuing to widely disseminate information will lead to significant capacity increases throughout various stakeholders.

Naomi brings extensive experience with dual diagnoses, psychotropic and psychiatric medications, the Department of Children and Family Services (DCFS), community resources, and the Regional Center system as both a former Harbor Regional Center (HRC) vendor director and a Program Manager within the Regional Center system itself. Between January 2020 and December 2021, Naomi led the charge and successfully onboarded approximately 48 individuals into Self-Determination at SCLARC. During her tenure, Naomi developed policies and procedures for all steps of the Self-Determination process, including evaluating and determining HCBS compliance of service providers identified on the spending plan. Utilizing experience and knowledge she began acquiring as a day program provider, Naomi assessed vendors and other disability-specific providers to determine if they abided by the requirements via two different self-assessments, direct communications with providers, and consultation with other professionals, including the HCBS specialist at SCLARC. Throughout her efforts in this area, she was able to increase interest in, and understanding of, Self-Determination in the vendor community, which was further cemented through outreach and training at multiple VAC meetings and partnership with the SCLARC VAC Co-Chair. This process allowed Naomi to remove roadblocks to certain vendors providing Self-Determination services through education, discussion, probing, and proposals of creative and person-centered solutions when necessary. Ultimately, no individual served by SCLARC was prevented from accessing a service in Self-Determination due to failure to meet HCBS requirements, and Naomi looks forward to continuing that streak with FDLRC in a way that will best support individuals served by the program to make choices and exercise autonomy in accordance with the principles of Self-Determination.

The COVID-19 pandemic prompted Naomi's creation and execution of a Self-Determination Training Series via Zoom, which broke the Self-Determination process down into manageable chunks, covering each topic in detail. This training series was held in partnership with FDLRC, with the same training materials and information provided to the greater community in English and Spanish, and without a need to utilize translators. The relationships formed during this training series will be beneficial to the teamwork required for the overall success of this contract. Similar trainings were presented to staff at SCLARC as well, and the frameworks of these trainings will be used in the execution of this proposal to generalize the information across Regional Centers and continue the previous success.

Naomi's specialty is in utilizing the Person-Centered Planning process to find unmet needs and changes in circumstances that can impact budgets and potentially address systemic disparities in service delivery. She combines this talent with her knowledge of the Lanterman Act, Purchase of Service (POS) policies, generic resources, and SDP Waiver definitions to creatively match the identified needs with services that can be provided. By ensuring that policies are understood and followed, Naomi is able to confidently and accurately suggest and advocate for additional services when appropriate (such as increased respite hours,

funding for social skills training, etc.) While this does maximize budgets, it also maintains cost-neutrality compared to what would be allowable in the traditional service delivery system as required under the law. Naomi's Person-Centered approach to developing budgets in this way was frequently praised by participants and other critical stakeholders. Overall, Naomi worked closely with not only participants and families but also Financial Management Service (FMS) agencies and Independent Facilitators (IFs) to develop templates, explain budgets, problem-solve, and ensure that services purchased on spending plans were appropriate and allowable per the waiver definitions and the Lanterman Act requirements. The relationships developed during this time are ongoing and will be utilized during the duration of the contract to make informed and accurate referrals to participants, as well as to assist with any challenges that arise during the spending plan process.

Naomi feels strongly that transparency is critical to building and maintaining strong relationships between the Regional Center and a participant and/or family, and she has found that collaborative, respectful, and consistently professional communication between all parties is essential to ensuring overall success. She has had great success with using plain language to explain the "why" behind decisions, which, even in times of disagreements, can decrease animosity, confusion, and distrust between parties, as well as the need for due processes and Fair Hearings. This is necessary and highly prioritized in both the budget development process, particularly when clarifying regarding whether funds may be added for a specific service and discussing rates for various services, as well as the spending plan process, in order to manage disappointment and frustration while ensuring purchases fall into the Lanterman Act definition of "services and supports for developmental disabilities."

In her role at SCLARC, Naomi specifically increased outreach to the Spanish-speaking and Hispanic communities, recognizing the need for culturally and linguistically appropriate communications and understanding that "lost in translation" is a real concern. This was not only through presentations and trainings, but also simple changes such as sending mass emails in both English and Spanish. In order to enhance communication and SDP-specific connection with the roughly 68.5% of the FDLRC community that does not identify as Caucasian, Phoenix Facilitation will have not only Spanish-speaking staff, but also parent partners from multiple Asian communities, as well as representatives of the Black/African-American community, in order to increase linguistic and cultural outreach and access. Phoenix Facilitation's diverse team also ensures understanding of the different cultural, systemic, socioeconomic, and socioemotional factors that impact the service needs of the community, as well as abilities and ways which different groups access services and interact with the interdependent systems that individuals served by Regional Centers are entitled to receive services from.

Naomi is confident of her ability to coordinate the entirety of this proposal due to her extensive management experience. Throughout her 17 years of management, 12 of which have been in various social services fields, she has managed up to 25 staff at one time in settings ranging from food service to psychiatric inpatient settings to day programs and a Regional Center case management unit. Naomi has been responsible for all aspects of employment, including utilizing creative recruitment methods that may ultimately assist Self-Determination participants to find staff to meet their needs, hiring, day-to-day supervision and guidance, performance evaluation, disciplinary action, and termination. Most recently, she supervised and guided dozens of Regional Center staff who were involved in Self-Determination in multiple areas of the agency, including Community Support, fiscal, and case management, while simultaneously maintaining overall responsibility for a separate case management unit with up to 14 Service Coordinators and 1000 cases.

Since leaving SCLARC, Naomi has continued her work with participants, families, and Self-Determination via consultation, Person-Centered Planning, Independent Facilitation, and advocacy

services that have thus far stretched across at least 14 of the 21 Regional Centers statewide, including through similar coaching contracts and supportive services provided to other Community Based Organizations (CBOs) at Alta California Regional Center (ACRC), Harbor Regional Center (HRC), and North Bay Regional Center (NBRC). As part of this venture, Naomi has to date worked with and created Person-Centered Plans for individuals ranging from two years old to adulthood, including those in the “transitional” stage wherein services shift from mainly generic resources to Regional Center providers. Previously, she has worked with all ages of Regional Center eligibility in her supervisory position over a “mixed-age” Regional Center case management unit, and she has further specific and direct experience with adults, including those who displayed challenging behaviors, through serving as a Program Director at a day program in Long Beach between 2015 and 2017.

Phoenix Facilitation benefits greatly from the many relationships and connections Naomi has made over the years working within the system. Due to her previous positions, she is not only familiar with and trusted by families and staff members at the Regional Center, but also acutely aware of the requirements and expectations of the Regional Center system. Naomi proudly maintains relationships with Self-Determination Specialists, Service Coordinators, management staff, and others within the agency and throughout the state who can speak to the high quality of her work and her passion, and she is aware of who will be available to provide assistance during this project if needed. Furthermore, Naomi previously maintained a Self-Determination Community Email List with over 1200 members statewide, which was used to build a community of stakeholders including participants, family members, Independent Facilitators (IFs), Person-Centered Planners (PCPs), traditional service vendors, and Regional Center staff from throughout the state. Naomi has been and remains a trusted resource on Self-Determination and Regional Center matters to many of these stakeholders and plans to use those relationships and knowledge to forge connections and ensure individuals and families at FDLRC impacted by this proposal are able to access high-quality services.

Elia Astudillo is a long-time community advocate and support member, with experience in case management, the Department of Children and Family Services (DCFS), Family Court, domestic violence education, and facilitation of parent education. Fluent in Spanish, Elia particularly connects with undocumented and other underprivileged community members, and she has extensive knowledge of generic and other resources that can provide additional support to individuals and families served by the Regional Center. Her passion lies with helping families as a unit, providing tools to help create and maintain a healthy environment where all members may thrive ongoing.

Abraham Flores Rojo is a bilingual (Spanish-Speaking) Advocate at Phoenix Facilitation. Abraham was raised with a cousin that has an intellectual disability. He learned early on the values of service, sacrifice, and devotion. Abraham’s background includes advocacy for children in the dependency system, special education (including teaching and TIGER advocacy training), and social work, including Regional Center Service Coordination and Person-Centered Thinking Training, as well as education to become a Board Certified Behavior Analyst (BCBA). He is a proud graduate from the University of Southern California with a Master’s Degree in Teaching. Abraham takes pride in his beliefs, he has courage in his convictions, and remains loyal in his pursuit to help people.

Felicia Ford is, first and foremost, the proud mother of Faith, a young woman served by the Regional Center who receives Self-Determination Services. She is the founder of Leap of Faith Family to Family Support, a non-profit organization that works to decrease disparities in the Regional Center system and assist participants and families with accessing services. Felicia has formal training as an Independent Facilitator, and Leap of Faith, with Felicia at the helm, was the recipient of 2022 Local Advisory Committee funding from ACRC, with which coaching and participant and family training was completed, experience which benefits the current proposal. Felicia is also a member of Westside Regional Center (WRC)’s Self-Determination Local Advisory Committee and has a keen eye for, and a particular interest in, supporting the Black community, including ensuring linguistic accessibility for individuals and families who speak Amharic. She is specifically one of the founding members of Justice Coalition 4

Families, as well as a member of Families United 4 Equity, and she participates on the SPA 5 Children's Planning Council Committee, the Community Outreach Committee, and "Help Me Grow LA." Felicia is also a member of the DDS Inter-Agency Coordinating Council (ICC).

Alex Garzon received a Master's Degree in Social Work from the California State University, Dominguez Hills and also holds an Associate Clinical Social Work (ACSW) License. He presently works at a psychiatric hospital as a clinical social worker, specifically in Developmental Delayed Units (DDMI), where he works with children, adolescents, and adults with development disabilities, Autism Spectrum Disorders (ASD) and mental health issues. Alex is trained in emotional interviewing and nonviolent crisis interventions to assist patients who undergo behavioral outbursts. As a psychiatric social worker, he has experience working with dual diagnoses and providing individual and group counseling utilizing Cognitive and Dialectical Behavioral modalities. He previously served as a bilingual Service Coordinator at a Regional Center, where he was trained in Person-Centered Thinking, and has served as a Spanish-speaking Person-Centered Planner and Independent Facilitator for clients through Phoenix Facilitation.

Zoey Giesberg identifies as a Self-Advocate, and is currently undertaking the process to receive Self-Determination services herself. Besides her own lived experiences, she also has extensive education, professional background, and interest in advocacy for individuals with developmental disabilities, including policy-making and change. Zoey holds a Master's Degree in Social Work (MSW) with a focus in Community Organization, Planning, and Administration from the University of Southern California (USC). She has worked in multiple and varied capacities with numerous and diverse organizations including but not limited to Focus on All Child Therapies (FACT), the Association of Regional Center Agencies (ARCA), WRC, Disability Vote United, Para Los Niños, the Los Angeles Mayor's Office, and Friendship Circle. She has received training in Person-Centered Thinking and has previously completed Person-Centered Plans. A strong editor, Zoey will assist the Phoenix team is providing inclusive materials with appropriate language at all times.

Julie LaRose is a graduate of the Guidelight Group's Independent Facilitator training course and the founder of Path Forward Facilitation LLC, which provides Independent Facilitation services to participants and families at multiple Regional Centers statewide. She is also the proud parent to two neurodiverse young men, has guided one of them through the process to receive Self-Determination services, and has participated in similar contracts via NBRC and San Gabriel Pomona Regional Center (SGPRC). With a Bachelor's of Science from the University of Minnesota Carlson School of Management, Julie brings to the Phoenix team and proposal not only her own experiences as a parent that can assist her to connect to and support others, but also expertise in organization and management.

Helen Reese is the parent of a young man who receives Self-Determination services from Regional Center of the East Bay (RCEB). She is not only his advocate who has had to explore the various resources and portions of the program, including communication with the Self-Determination Ombudsperson, but also a trained Independent Facilitator via Charting the Life Course. In this role, Helen has worked with numerous Regional Centers, including FDLRC, WRC,s and North Los Angeles County Regional Center. In 2021 and 2022, Helen led a successful coaching program through the Local Advisory Committee at SCLARC, and since fall 2022, she has also been part of a similar program at HRC. Helen speaks Mandarin and is able to provide language of choice services to the Chinese community

Claire Seo's interest in supporting her community comes from her own lived experiences. With a family of Korean and Chinese background and a daughter with a rare genetic disorder diagnosed in only 25 people in the world, she can personally attest to a struggle of accessing Regional Center services, including the Self-Determination Program, which took her and her family almost 18 months, and three false starts, to transition to. She will support the Phoenix team in connecting to participants and families from Asian backgrounds through understanding of the unique cultural, linguistic, and other barriers that can arise. Claire's daughter's diagnosis brings with it a high level of need for services, as well as medical complexity, and she will further be able to support and encourage participants and families who experience similar to understand and access appropriate resources.



Outreach Proposal for Frank D Lanterman Regional Center's Self-Determination Program

Special Needs Network (SNN) is a leading disability and social justice nonprofit. Our mission is to raise public awareness of developmental disabilities and to impact public policy, while providing education and resources to families, children, and adults. Since our founding in 2005, we have provided services and resources to more than 50,000 families, built a powerful coalition of 500+ parent advocates, and are often a lead organization on key disabilities legislation.

The proposed project is the launch of a campaign to assist the Frank D Lanterman Regional Center in increasing the participation of Black and Latino families in their Self-Determination Program (SDP).

Special Needs Network will utilize a sample group of Black and Latino Lanterman clients who are currently enrolled in SDP as ambassadors and provide them a \$250 stipend for their support. We will utilize this group's feedback to create a comprehensive white paper/report that will identify why these families have selected the SDP and what are the motivators for them to participate.

Clients not currently participating in the SDP, will then be connected by our staff with families from the sample group (ambassadors) to assist in encouraging their participation based on their experience with the program. SNN will work one on one with these families expressing some interest after hearing about the program in detail and information sessions.

SNN's proven engagement experience and trust in the community and skill in working with families, we anticipate will yield the most success.

A robust outreach and awareness program for these families will provide the following:

- A max of 2 outreach/informational session events tailored to each group
- A white paper/report that will answer why these identified families are currently not taking advantage of SDP and identify any barriers families may have encountered
- Provide parents with detailed information about the freedom and flexibility that SDP provides
- An ambassador-type approach – Families will be linked with ambassador families who will assist them in signing up and taking advantage of the program.

The budget below is at minimum based on 25-50 families. If the number of identified families is between 50-100, the budget would need to be adjusted accordingly to reflect additional staff time.

SDP Program Recruitment Campaign Budget

	Total
Staff Time	\$60,000
Catering & Refreshments	\$2400.00
Childcare	\$14,000
Binders & Supplies	\$3400.00
Navigator	\$10,000
Translator	\$3600.00
Facility Rental	\$6000.00
Translation Equipment	\$3000.00
Ambassador Families' Stipends	\$2,500.00
Total	<u>\$104,900</u>

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FRANK D. LANTERMAN
REGIONAL CENTER

GRUPO DE APOYO AL PARTICIPANTE DEL PROGRAMA DE AUTODETERMINACIÓN ULTIMO MIERCOLES DEL MES 10:00AM-12:00PM

Solo participantes actuales de Lanterman!*

Bienvenido al nuevo grupo de apoyo para los participantes del Programa de Autodeterminación. Este grupo se reunirá mensualmente por zoom. Alternaremos entre foro abierto y ponentes invitados sobre temas elegidos por el grupo.

Autodeterminación es un programa en evolución. Colaboremos para que sea un éxito!!

Facilitadores:

Kristianna Moralls (kristianna.moralls@gmail.com)

Personal de Apoyo

Adrian Jimenez (ajimenez@lanterman.org)

Organizado Por:



Koch ♦ Young
RESOURCE CENTER

* Si está interesado en obtener más información sobre el Programa de Autodeterminación, consulte la orientación obligatoria en: <https://lanterman.org/selfdetermination/upcoming-orientations>

**Comparte tus
experiencias en el
Programa de
Autodeterminación**

**Más información
sobre opciones,
soluciones y
estrategias creativas**

Compartir Recursos

**Conoce a otros
participantes en el
programa**

**Aprende de oradores
invitados expertos**

**REGÍSTRESE CON
ANTICIPACIÓN PARA
ESTA REUNIÓN:**

<https://us02web.zoom.us/j/20qzLiGdahBWOxeAqKadm3FQtEznJp>



FRANK D. LANTERMAN
REGIONAL CENTER

자기 결정 프로그램 참가자 서포트 그룹 SELF-DETERMINATION PARTICIPANT SUPPORT GROUP

매 월 마지막 수요일, 10:00AM-12:00PM

*현재 랜터맨 리저널 센터에서 SDP 에 참여하고 계신 분들만
참석 하실 수 있습니다.

랜터맨 리저널 센터 가족분들 중, 자기 결정 프로그램에 참여중인 분들을 초대합니다.
본 모임은 Zoom 을 통해 화상으로 진행되며, 오픈 포럼의 기회와 참가자들이 원하는
주제에 대한 초대 강사의 강연을 번갈아 진행 할 예정입니다.

자기 결정은 계속 발전 중인 프로그램입니다. 함께 힘을 합쳐 성공적인 프로그램으로
만들어 가길 희망합니다.

진행 / Facilitator:
Kristianna Moralls (kristianna.moralls@gmail.com)
지원 스태프 / Support Staff:
Adrian Jimenez (ajimenez@lanterman.org)

지원:



Koch ♦ Young
RESOURCE CENTER

오셔서
자기 결정 프로그램
경험담을
함께 나누세요!

다양한 선택지와
여러 대안,
전략들 공유

정보 교류

다른 SDP 참가자들과의
만남

초대 강사의 강연

사전 등록 링크:

[https://us02web.zoom.us
/meeting/register/tZUtd-
2oqzliGdahBW0xeAqKadm
3FQtEznJp](https://us02web.zoom.us/j/zoom-link)

* 자기 결정 프로그램에 대해 더 알아보고 싶으신 분들은 아래 링크를 통해 필수 오리엔테이션을 들으실 수 있습니다.
<https://lanterman.org/selfdetermination/upcoming-orientations>

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AGENDA ITEM 6. Best Practices Subcommittee Proposals

North Los Angeles County Regional Center's SDAC created a "best practices subcommittee" comprised of two members who develop agendas for the SDAC meeting, explore topics for the SDAC to discuss, and draft proposed actions. Following that lead, two members of the FDLRC SDAC (Kristianna Moralls and Pierre Landry) have been meeting frequently to discuss SDP issues in general and Lanterman's implementation of the program. At the December 2, 2022, SDAC meeting, Mr. Landry proposed the establishment of a similar subcommittee for Lanterman's SDAC. That motion was approved, but upon further research, the Bagley-Keene Open Meeting Act restricts to "less than three" the number committee members who can discuss committee issues without being in a publicly noticed and scheduled "open meeting." Therefore, we propose that the B-P Subcommittee remain at two members. We propose the following:

1. SDAC Working Group Meetings.

Currently, the SDAC meets every other month on the even-numbered months. We propose that an SDAC Working Group should meet on the first Thursday of the odd-numbered months for 90 minutes starting at 4:30 PM. This plan will provide a regularly-schedule time to work on developing proposed actions by the SDAC on specific topics. These bimonthly meetings would be B-K compliant and would allow greater participation and more focused discussion using a time certain agenda. For example, Item 1 would be discussed for 30 minutes, then Item 2 for a certain amount of time, and so forth. SDAC members and members of the public could stay for the whole meeting or just for the topics they were interested in.

2. Committee Training.

Chris Arroyo, Manager of the SCDD Los Angeles Regional Office, has offered to provide training for our SDAC members about the role of the SDAC and how to have an effective meeting. Chris has provided this training session for other SDACs; the topics include: Bagley-Keene, simplified parliamentary procedures, effective meeting management, member participation expectations, setting SDAC goals, and dealing with conflicts of interests. We propose that this training be offered on March 2, 2023, 4:30-6:30 PM, the first SDAC Working Group meeting. Mr. Arroyo says it can be structured to take from 1¼ to 2 hours, so we should discuss the start time and the length at the SDAC meeting of Feb. 2, 2023.

3. Outreach Efforts to Underserved Communities.

We have been trying to meet with Lareka Killebrew about ideas for reaching out the African American community and with Jaime Cha-McGrath for the Korean community. Given Bagley-Keene restrictions, however, this should be addressed in a noticed Working Group meeting.

4. Survey of FDLRC SDP participants.

Because we have a list of email addresses for the SDP participants, we have the ability to conduct a survey about their participation. Example questions: How did you hear about SDP? Were there any delays with any of the milestone steps? Did you need to go to a fair hearing? Would you recommend SDP to others? We propose that the SDAC Working Group discuss the usefulness of such a survey, the list of questions, what use we would make of the responses, whether we need to use a survey firm paid with SDAC funds, and so forth.

5. SDAC Input to the Curriculum for the Service Coordinators' SDP Training

FDLRC provides training for the service coordinators pertaining to the Self-Determination Program. Members of the SDAC and others may have useful suggestions for how this training prepares the SCs to help folks get into the program. Staff is asked to suggest ways that SDAC members can provide meaningful and timely input.

6. Request for Annual Reports to DDS

According to the legislation that created the SDP, each regional center is providing DDS with data so DDS can annually provide the information below to the appropriate policy and fiscal committees of the Legislature. The SDAC would like to receive copies of the reports that have been submitted to DDS for past years and going forward.

WIC §4685.8 (y). Commencing January 10, 2017, the department shall annually provide the following information to the appropriate policy and fiscal committees of the Legislature:

- (1) Number and characteristics of participants, by regional center.
- (2) Types and amount of services and supports purchased under the Self-Determination Program, by regional center.
- (3) Range and average of individual budgets, by regional center, including adjustments to the budget to address the adjustments permitted in clause (ii) of subparagraph (A) of paragraph (1) of subdivision (n) [unaddressed needs or resources; inevitable changes].
- (4) The number and outcome of appeals concerning individual budgets, by regional center.
- (5) The number and outcome of fair hearing appeals, by regional center.
- (6) The number of participants who voluntarily withdraw from the Self-Determination Program and a summary of the reasons why, by regional center.
- (7) The number of participants who are subsequently determined to no longer be eligible for the Self-Determination Program and a summary of the reasons why, by regional center.

7. DDS Presentation on Electronic Visit Verification (EVV) for SDP participants

The 21st Century CURES Act, signed into law in 2016, requires that States set up an EVV system to verify that services for all Medicaid-funded personal care and home health care services occurred. DDS has implemented this system for the SDP beginning on January 1, 2023. Jennifer Parsons (DDS) should be invited to make a presentation to the SDAC, either at the March Working Group meeting or the April SDAC meeting.