



## Self-Determination Advisory Committee (SDAC) Meeting Agenda

April 8, 2024

5:00 PM to 7:00PM

### Teleconference via Zoom Webinar

<https://us02web.zoom.us/j/87481900522?pwd=WGpEVnRUZ283UlhqGtPSIJLaE9Udz09>

Passcode: 062916

Or Telephone:

Dial (for higher quality, dial a number based on your current location):

Webinar ID: 874 8190 0522

Passcode: 062916

International numbers available: <https://us02web.zoom.us/j/87481900522?pwd=WGpEVnRUZ283UlhqGtPSIJLaE9Udz09>

*Pursuant to Government Code Sections 11123.1 and 11125(f), individuals with disabilities who require accessible alternatives formats of the agenda and related meeting materials and/or auxiliary aids/services to participate in the meeting should contact Isis Rasmussen at (661) 873-4575 or email at [isis.rasmussen@kernrc.org](mailto:isis.rasmussen@kernrc.org)*

# AGENDA

1) Call to Order

2) Establish of Quorum:

- This means at one more than half of the committee members needs to be present for votes to occur. That means three committee members need to be present to vote, but the committee can discuss and solve problems without voting on anything.
- There are seven members of this committee:
  - Rick Wood, chair (SCDD appointee)
  - Kelly Kulzer-Reyes (KRC appointee)
  - Nico Snyder (KRC appointee)
  - Sandra Van Scotter (SCDD appointee)
  - Adeyinka Glover (OCRA representative, required by statute),
  - Norma Tuiasopo (Family Resource Center representative- Exceptional Families Center, required by statute)
  - Abigail Teasdale (SCDD appointee)
- If you are interested in serving, please contact KRC's Enrique Roman or SCDD's Yolanda Cruz to volunteer.

3) Additional Items: Discussion items can be added. Items added here cannot be voted on today. You can also mention things you would like focused on at a future meeting.

4) Public Comment: Comments about items not on the agenda are welcome! If your concern/topic is on the agenda, please join the discussion and add your thoughts there, too.

5) Approval of Minutes for SDLVAC Meeting March 4, 2024 **Action**

6) Public Participation Parameters/Rules

7) Status of SDP (Wood/Kulzer-Reyes)

- Updates on SDP at KRC and statewide **Discussion**
  - a. Celebrations (Kulzer-Reyes)
  - b. Obstacles (Kulzer-Reyes)
  - c. Directives (Wood/Kulzer-Reyes)
  - d. Statewide Committee updates (Wood)
  - e. Election of Committee Chair
  - f. Review Draft of RFP Attachment 1 (Melanie Waters)
  - g. Review NLACRC Self-Determination Local Advisory Committee Recommendations on 099, Attachment 2 (Wood)

8) KRC Updates **Discussion**

- a) Self-Determination Program Enrollment
- b) General Updates on the Self-Determination Program
- c) *Data request: Presentation and Discussion of the obstacles in the transition to SDP -*
  - a. SDP Enrollment summary (Participant Choice Specialists)

- b. Orientation completions (demographic data: ethnicity, location, and language group)

9) Topics for Next Meeting

**Discussion**

- **Members of the public – suggestions welcome!**

Upcoming meetings,

2024 SDPLVAC meeting Schedule;

- May 6, 2024
- June 3, 2024
- July 1, 2024
- August 5, 2024
- September 9, 2024
- October 7, 2024
- November 4, 2024
- December 2, 2024

10) Adjournment

ATTACHMENT 1



Date: XXXXX  
To: All Interested Providers  
From: Self-Determination Local Advisory Committee & Kern Regional Center  
RE: Request for Proposal for Use of Self-Determination Implementation Funds  
Fiscal Year 2022/2023

Kern Regional Center (KRC) along with the local Self-Determination Advisory Committee (SDLAC) is requesting proposals from an individual and or organization interested in assisting KRC consumers in transitioning into the Self -Determination Program. A [Narrative](#) outlining the priority areas that need to be addressed and a [Rubric](#), which identifies plans for training and support and the weight given to various aspects of the proposal, is available as a reference.

All proposals must be received no later than XXXXXXXX and should be submitted electronically to Melanie Waters, KRC Dental Coordinator/SDP Liaison at [mwaters@kernrc.org](mailto:mwaters@kernrc.org). Selection of proposals will be discussed and made at the next local SDLAC meeting to be held on XXXXX. Information on this meeting can be found at [www.kernrc.org](http://www.kernrc.org).

Employees of the State of California, State Council on Developmental Disabilities (SCDD), Department of Developmental Disability (DDS), and Kern Regional Center (KRC) are not eligible to submit a proposal. Each applicant must sign a Business Associate Agreement (BAA) with Kern Regional Center (KRC). All applicants must demonstrate familiarity of the Lanterman Act.



**Kern Regional Center Self-Determination Local Advisory Committee**  
**Request for Proposals for Use of Self-Determination Implementation Funds**  
**Fiscal Year 22/23**

Funds in the amount of \$78,024.99 have been allocated by DDS to Kern Regional Center to support implementation of the Self-Determination Program (“SDP”). The SDLAC requests that any individual and/or organization interested in presenting a proposal to the SDLAC to assist SDP individuals and families in understanding the SDP, identifying independent facilitators and Fiscal Management Services, training to create a person-centered plan, budget and spending plan, and assisting and encouraging participants and families to transition to the SDP are invited to present a proposal to provide some or all of the services identified above.

DDS has identified the following priority areas for funding, including:

- Recruitment and training of independent facilitators
- Joint training for participants, families, regional center, SDLAC members and others
- Support or coaching in making the transition to SDP
- Assistance with spending plan development
- Orientation support
- Collaborative groups/workshops to foster ongoing, shared learning and problem-solving opportunities.

SDLAC has highlighted “Outreach Activities” as a key strategy toward implementing DDS’ priorities now and in the future. In addition, the SDLAC has emphasized the need for services and SDP related written materials to be provided in Spanish as well as in English languages. KRC is willing to collaborate with the awardees by sharing resources and current written materials.

SDLAC has identified the following priority areas under “Outreach Activities” to include but not limited to:

- Resource Fairs
- Video development for SDP (videos must be in plain language and accessible to individuals with developmental &/or intellectual disabilities)
- Question and Answer Sessions
- Mass marketing campaign
- Vendor Training sessions

~~Enclosed is a rubric which identifies plans for training and support and the weight given to various aspects of a proposal.~~ The suggestions are not exclusive. A proposal shall include the proposed cost for services provided.

All proposals must be received no later than **XXXXXXXX** and should be submitted electronically to Melanie Waters, KRC Dental Coordinator/SDP Liaison at [mwaters@kernrc.org](mailto:mwaters@kernrc.org).

Selection of proposals will be discussed and made at the next SDLAC meeting to be held on XXXXXX.

**Applicant Qualifications and Roles** – The proposal must describe the applicant’s qualifications such as work activities, expertise, knowledge, and experience. Experience should include examples of similar related individual and family support work.

**Some key qualifications that will be considered:**

- Knowledge of the Self Determination Program
- Person-centered approach and understanding of the HCBS final rule
- Experience navigating the various systems of care
- Understand and be active in the developmental disability community
- Problem-solving skills
- Flexibility
- Speak preferred languages for the underrepresented communities
- Preference to applicants that reflect the demographics of Kern Regional Center
- Proven experience and success in outreach to underrepresented communities
- Experience organizing and giving presentations to inform and attract participants to the SDP
- Experience with data collection and analysis of the outcomes
- Be patient and able to provide personalized attention when needed

**Work Plan** – The proposal should include a detailed description of the activities to be conducted and completed by the applicant. The work plan should include a budget that breaks down the overall cost of the project completion and how many individuals would be supported during the contract period.

**References** – May be requested upon review of proposal.

**Scoring -**

Proposals will be reviewed and evaluated on the following criteria:

1. Qualifications (25%)
2. Scope of Proposal (30%)
3. Work Plan (30%)
4. Budget (15%)



1. Submitter(s) should explain **what kind of support they want to provide and why they are qualified** to provide this service to participants and families entering the Self Determination Program. Submitter(s) should also explain their knowledge of the Lanterman Act.  
La persona entregando esta solicitud debe explicarse **que tipo de apoyo quieren proveer y porque están calificados** proporcionar el servicio a participantes y familias entrando el programa de la autodeterminación. Los solicitantes también deben explicar su conocimiento de la ley de autodeterminación y de la Ley Lanterman."
2. How many Self-Determination participants do you hope to serve? (It is not necessary to help large numbers, but having a plan helps us understand the possible impact of your project).  
¿A cuántos participantes del Programa de Autodeterminación espere servir con su programa/plan de entrenamiento? (No es necesario ayudar a muchas personas, pero identificar el impacto nos ayude entender el posible impacto su proyecto.)
3. What will a person know after completing this program/training? Explain what someone completing your training should know. A list is fine.  
¿Qué va a saber una persona quien participe en su proyecto después del programa/entrenamiento? Explique lo que alguien que completa su entrenamiento debe saber. Una lista está bien.
4. Our plan includes support in:  
Nuestro plan de apoyo incluye:
  - a. English/inglés
  - b. Spanish/español
  - c. Other/otro
5. Explain your plan.  
Explique su plan.

**Priority areas for the funding include:**

**Outreach Activities** – Meant to reach numerous people and to bring knowledge and expertise on a particular topic to the public. To include but are not limited to resource fairs, community events, health and wellness events, video development for SDP, question and answer sessions, mass marketing campaign and vendor training sessions.

- **Orientation Needs** – Costs of providing orientation including, but not limited to, modifying/printing materials, speakers/presenters' expenses, meeting space expenses, translation/interpreters, etc.
- **Recruitment/Training of Independent Facilitators** – Costs associated with increasing the number of available independent facilitators. This could include, but is not limited to, recruitment, development and/or provision of training, translation/interpreters, costs related to the provision of training, etc.
- **Collaborative Groups/Workshops** – Ongoing and/or periodic meetings for participants and families, providers, etc., to provide learning and problem-solving opportunities. Costs could include, but are not limited to, speakers/presenters' travel expenses, translation/interpreters, materials, meeting space expenses, etc. This may involve coordinating with LVACs/participants in other areas to increase the scope of the learning opportunities/information sharing.
- **Joint Training** – Training for participants, families, regional center staff and members of local volunteer advisory committees, etc. Joint trainings should focus on shared learning opportunities that increase the collective understanding of all involved with SDP. Costs could include, but are not limited to, development and/or provision of training, translation/interpreters, costs related to the provision of training, etc.
- **Support/Coaching for Transition to SDP** – Support for participants in transitioning to SDP. This could include support in areas such as deciding which financial management service model is the best fit for a participant, suggestions for recruiting/hiring employees, how to establish backup staffing plans, etc.
- **Initial Spending Plan Development** – Support in developing the participant's use of their individual budget through their spending plan, which may include consultation with a financial management service.
- **Additional Identified Needs** – Items/activities, which will support the needs of participants and implementation of the program.

Link to DDS Directive: <https://www.dds.ca.gov/initiatives/sdp/program-directives/#collapse-panel-12>

Click on guidance within the September 27, 2022, update to download the complete document in English.

Haga clic en la palabra "guidance" en la página debajo de xxxxxx para bajar el archivo completo en inglés.

DRAFT

ATTACHMENT 2



February 1, 2024

**To:** Nancy Bargmann, Director of the Department of Developmental Services  
**Cc:** Vicki L. Smith, Suzy Requarth, Katie Dempsey, - Department of Developmental Services  
**Cc:** Katie Hornberger, Office of SDP Ombudsperson  
**Cc:** Aaron Carruthers, Chris Arroyo, State Council on Developmental; Disabilities  
**Cc:** Ana Quiles: North Los Angeles County Regional Center Board of Trustees  
**Cc:** Cristina Pruess, Evelyn McOmbie, NLACRC Senior Staff

**From:** North Los Angeles County Regional Center - Self-Determination Local Advisory Committee - NLACRCSDLAC@gmail.com

**Re: Recommendation to Revise the Self-Determination Program Directive: Updated Initial Person-Centered Plan and Pre-Enrollment Transition Supports Guidance of 12/22/23.**

Dear Ms. Bargmann,

The North Los Angeles County Regional Center Self-Determination Local Advisory Committee has authorized this communication as a recommendation to the Department of Developmental Services (DDS), the SDP Ombudsperson, the State Council on Developmental Disabilities (SCDD), the North Los Angeles County Regional Center (NLACRC) Board of Trustees, and the NLACRC Interim Executive Director. The topic is the concerns and questions still surrounding the issues related to the Self-Determination Program Directive: Updated Initial Person-Centered Plan and Pre-Enrollment Transition Supports Guidance (December 22, 2023).

After careful review of the DDS Directive, and our SDLAC members' attendance at the DDS training on this Directive on January 16, 19, and 20, 2024, and other community forums on SDP, our committee has several areas of concern, and two specific recommendations to propose as SDP Best Practices. This Directive intends to offer essential transition support to persons who are eligible to become participants in the Self-Determination Program. This vital assistance must be available due to the complexity of the process and mechanics of entering the SDP, which still reasonably requires resources and assistance to make the transition into SDP with its new concepts and paradigm of Budgets and Spending Plans.

During that transition into SDP, it is universally agreed that potential SDP Participants need coaching and advocacy in navigating the processes and mechanics of the various regional centers, with NLACRC. It is known that many RC representatives, including CSCs, are so new to SDP that the principles, mechanics, and rights of Self-Determination participants may be unfamiliar, misunderstood, and changing on a regular basis. Yet we also know that SDP works, even with some sand still in the mechanism that slows enrollment and increases frustration.

**Please know that our committee takes our responsibility as an affirmative duty. WIC 4685.8**  
***“The committee shall review the development and ongoing progress of the self-determination program, including whether the program advances the principles of self-determination and is operating consistent with the requirements of this section, and may make ongoing recommendations for improvement to the regional center and to the department.”***

**Our primary concern and recommendations are that the recently issued Directive (12/22/23) only increases the potential SDP participants’ dependency on finding a Vendor, and it does not seem that there will be enough 099 vendors to meet the need. Our SDLAC has previously expressed concern on how the differing requirements among the RCs for liability insurance for vendors functions as a barrier, especially for the small starting transition professionals that may be just what our system needs to fill those gaps that account for disparities and frustration.**

**NLACRC SDLAC also joins the voices of our community that are concerned that the function of “Advocacy” is not included in the functions listed in the Directive. Although the exclusion of “Advocacy” might be an oversight, “Advocacy” is essential to advance the principles of SDP and the rights of the SDP participants. Therefore, we recommend including “Advocacy” as a duty of all SDP transition professionals. If we expect SDP to be the flexible solution to the problems of unaddressed needs and the cultural disparities that are evident in many studies and reports, we will need well-informed advocacy, at least until NLACRC has the current staff vacancies filled with CSCs that are well-trained in the principles, mechanics, and the rights of the SDP participants.**

**As part of our review of this Directive, we have studied the “DDS Directive Brief” dated Jan 16, 2024, developed by Disabilities Voices United, which is endorsed by us in its entirety and is attached to this NLACRC SDLAC recommendation to revise this Directive. We agree that this DVU proposal resolves many of the issues and concerns our NLACRC SDLAC identified in our review.**

**We agree that making this transition support available as non-vendored Self-Directed Supports under Participant Directed Services would allow those costs to be federally reimbursable and allow this essential service to be self-sustaining. This would also address the concerns expressed by DVU that are shared with our committee, including avoiding conflicts of interest and the inclusion of advocacy as a transitional SDP service. We also make these recommendations to avoid the anticipated shortage of SDP transition support if the current Directive is not revised. We believe this will increase participant choice and address the increasing disparity that would occur with insufficient professional transition support to serve everyone who might benefit from those supports.**

So, after our review of the development and ongoing progress of the Self-Determination Program, NLACRC SDLAC makes the following recommendations both as a Best Practice and to advance the principles, mechanics, and rights of the SDP participants. These recommendations are the same as those recommended by DVU.

**Recommendation from NLACRC SDLAC to DDS: (from DVU 1/16/24)**

***“Provide non-vendored Self-Directed Supports under Participant Directed Services. This is federally reimbursable, maintains participant choice, and eliminates conflict of interest.***

**-AND**

***Update the Service Definition for General SD Supports to include the WIC code definition of independent facilitator role and services to include advocacy.”***

We recognize that the current Directive has a deadline of 2/29/24, so we submit this with urgency and a request for action and notice to our community.

**Yours in Freedom, Authority, Responsibility, Confirmation and Support,**

**Lori Walker and Richard Dier, Co-Chairs of the NLACRC SDLAC**

NLACRCSDLAC@gmail.com

Attachment: DVU 1/16/24 DDS Directive Brief

Distribute to all NLACRC SDLAC members and NLACRC SDP Best Practice Committee

Approved for sharing.





## DDS Directive Brief

Jan 16, 2024

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**RE: Self-Determination Program: Updated Initial Person-Centered Plan and Pre-Enrollment Transition Supports Guidance - December 2023**

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Currently, Disability Voices United advises independent facilitators against seeking Regional Center 099 vendorization. We believe it is not in the best interest of Self-Determination Program participants, and here is why:

- Conflict of Interest:
  - Regional Centers can examine the records of vendors who provide services to participants. If a Self-Directed Support (099) vendor is serving a participant involved in a fair hearing or 4731 complaint, the regional center may demand access to their files. This situation represents a significant conflict of interest.
- Participant Access to Advocacy not included in the Service Definition:
  - The Service Definition - General SD Supports (099) does not include advocacy. Participants utilizing independent facilitators under 024 followed the legal definition which includes "...advocating on behalf of the participant in the person-centered planning process and development of the IPP, and obtaining identified services and supports."
- Limits Participant Access to Supports:
  - The infrastructure does not exist to mandate the use of 099 vendors and removal of Option A. DVU recently put in a Public Records Act requesting names of all 099 vendors statewide. Only eight names were on the PRA Response (including two financial management services). Many Regional Centers have no vendors in place.
- Limits Participant Choice:
  - Participants will be limited to 099 vendors for support. Regional Centers can selectively provide 099 vendor options to the participant.
- Increases potential for disparity:
  - With limited infrastructure, non-vendored independent facilitators may offer private pay transition supports. Only participants who can afford to pay out-of-pocket will be able to access transition supports.

### **Recommended Resolution:**

Provide non-vendored Self-Directed Supports under Participant Directed Services. This is federally reimbursable, maintains participant choice, and eliminates conflict of interest.

**-AND-**

Update the Service Definition for General SD Supports to include the WIC code definition of independent facilitator role and services to include advocacy.



Left blank intentionally

## KRC SDAC Meeting Minutes

March 4, 2024

1. Call to Order. 5:03 p.m.
2. Establish of Quorum. Present were Rick Wood, Kelly Kulzer-Reyes, Nico Snyder, Sandra Van Scotter and Adeyinka Glover. A quorum was established.
3. Additional Items. None.
4. Public Comment. None.
5. Approval of Minutes of February 5, 2024 Meeting. Approved with 4 votes, Kelly Kulzer-Reyes abstaining.
6. Without objection, the chair deferred items 6.c, d, e and g to April 8, 2024 meeting.

Celebrations and Obstacles. Sandra: celebrations are work; participants are learning what they know and what they want. Rick spoke to the bonding of caregivers of his son during recent blizzard. Kelly reported her son's bills are paid on time, records are received timely (Mainsl). Kelly reported that Kern Down Syndrome Network meetings are now live. Lots of interest in the SDP. Rick reported FMS obstacles.

Kelly Weberg (sp?) spoke about her brother's wonderful team, but a struggle in getting needs met or changed. She asked how her brother's voice can be heard?

Stevie Adamson spoke about lack of communication and delay in enrolling her child in the SDP; and requested that items related to safety and elopement , such as air tags, security, large stroller, etc. be approved as part of plan. Sandra stated that Stevie's concerns are being heard, that SCs need more critical thinking in order to support SDP participants, and the PCP and spending plan needs to conform to the objectives in the IPP. Adeyinka requested that an agenda item be added to the next meeting to address Stevie's concerns including KRC staff to respond to the staffing issue. Michi Gates spoke to the "insurmountable" staffing issue in Bishop and agreed that more and better communication is needed between SCs and participants.

Melanie Waters summarized the draft RFP for year-4 implementation funding. Discussion led by Kelly about use of the rubric vs. scoring mechanism. Consensus reached to eliminate the percentages (weight) applied to 4 categories in the scoring model. Sandra stated that the subcommittee did not want to tell prospective applicants what to do. Kelly asked that activities be focuses on the most impact for the funds expended. The committee agreed that the subcommittee, consisting of Rick, Sandra, Adeyinka and KRC staff will convene on March 18 at 10 a.m. for 1 hour to refine and finalize the draft RFP based on the discussion and will bring it back to the full committee in April

7. KRC Updates. Tomas Cubias presented self-determination program enrollment including by demographics, language, etc. See attached. Sandra asked if in the future the presentation of numbers focus on "where we are," i.e., considering a larger view in relation to outreach efforts.

Kelly asked for feedback on adult employment in the SDP. Adeyinka asked how to interpret Spanish speaking data, i.e., are caregivers, parents or consumers Spanish speaking?

Melanie Waters provided update on expenditure of year-3 implementation funds by Ally, First Choice, and Community Integration, including a description of activities: Ally: orientation, workshops, Spanish sessions; First choice: orientations, coaching, transition including challenges, i.e., slow in getting a budget and in getting funding requests to FMSs; Community Integration: orientations, coaching, transition, SDP workshops, virtual orientations, "Ask an IF," distribution of flyers. Kelly requested that flyers be put on KRC's social media sites.

8. Topics for Next Meeting. To include discussion of complaints re: communication and delay in transition to the SDP; and approval of year-4 RFP.

9. Adjournment. On motion by Kelly to adjourn, seconded by Nico, meeting was adjourned by unanimous vote at 6:57 p.m.

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