



**SELF-DETERMINATION LOCAL ADVISORY  
COMMITTEE MINUTES  
Approved June 7, 2021**

**Date:** Monday, May 3, 2021

**Start Time:** 7:00 pm **End Time:** 8:30 pm

**Location of This Meeting:** Zoom- no physical meeting location

**Location of the Next Meeting:** Zoom-no physical meeting location

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**ATTENDEES:**

**Committee Members Present:** Co-Chair Irene Litherland, Co-Chair Melissa Crisp-Cooper, Vi Ibarra, Arthur Lipscomb, Dianne Millner, Neil Jacobsen, Jocelyn Manalac, Morena Grimaldi, Pei Wang, Pamela Baird

**Committee Members Absent:** none (Sandra Coss on leave)

**RCEB Staff Present:** Jenifer Castaneda, Lisa Kleinbub, Ronke Sodipo

**SCDD Staff Present:** Sheraden Nicholau

**Guests:** Peter Kangas, Kishan Sreedhar, Michelle Hernandez, Ericka Gonzalez, Paula Senigar, Helen Reese, Chris Wecks, Allan Smith, Ernie Cruz, Veronica Poon, Lisa Sowle, Bob Pigozzi, Gail, Lorena Gomez.

**Agenda Item: Welcome, Designate Minutes Taker, Chat Monitor and Introductions**

Committee members and guests all introduced themselves. Vi volunteered to take minutes.

**Agenda Item: Consent to the Minutes**

M/S/C "The committee moves to approve the April 5, 2021 minutes as submitted"  
[Ibarra/Grimaldi] Passed unanimously.

**Agenda Item: Reports from Co-Chairpersons, including Project Updates**

Irene reported that all local advisory committee chairpersons were invited to attend a meeting with DDS in April to provide input about what has and what has not been working in the SDP transition process, and any suggestions for improvement. Both Melissa and Irene were able to attend.

The co-chairs are meeting with other Bay Area advisory committee chairpersons to discuss ways to partner. They are discussing the possibility of sharing a website and coordinating translation for meetings.

The committee's project of recording the Independent Facilitator training is nearing completion. The English and Spanish recordings are being reviewed and the Cantonese voiceover translation is being made this month. The work group developing transition guideposts has also continued to work on that project.

Melissa reported that 17 people are currently receiving coaching services, including one who transitioned to SD in May. Several of the others are currently in the spending plan phase of transition. A concern that is being identified by the coaches is a lack of discussion around unmet needs with case managers. Comments or concerns from coaches' experience include that the budget process still seems limiting for selectees. In some instances, selectees have been told that their spending plan line item amounts have to match the budget line item amounts ! Some case managers don't ask selectees if they would like to discuss changes in circumstance or unmet needs. They want selectees to work within their initial budget total.

**Agenda Item: Update from Regional Center:**

Jenifer reviewed the summary report, attached.

Lisa reviewed a PowerPoint presentation showing data on clients selected for SD and transitioned to SD based on race/ethnicity. There was discussion on the disparities that exist in the traditional system, and how that carries over to the SD program. Also discussed were ideas around how to ameliorate those disparities. Lisa will also look into similar data based on age, and diagnosis category.

A question was asked regarding the DDS directive to not have FMS fees paid out of a participant's individual budget that was issued effective October 2020 and has been extended through May of 2021. RCEB does not yet have guidance on how to process that directive and how it will impact budgets.

**Agenda Item: Results from Survey of Self-Determination Program Selectees**

Melissa reviewed some of the survey results:

We had 50 responses: half adults, half kids. Almost all living with family. Twenty-one paused, around 5 due to Covid, many say it's too complex. Almost 90% attended orientation in 2019.

The first question for every step was "Have you started the \_\_\_ process?" Only people who had started the step would answer the associated set of questions. So, most people only answered a small set of questions.

Most of the steps had this set of questions:

- Where are you in the process?

- Did you get all the help you needed?
- Who helped you with this step?
- How long have you worked on this step? (2-6 months was the most common answer for all the steps.)
- How well did you understand the process?

A summary of the results in each transition step:

- PCP: Around 33 people had started or completed PCPs and got the help they needed, although a few people still needed help.
- Budget: Several people had not received their initial budget. Many people didn't have the opportunity to discuss unmet needs or changes in circumstance. Few people understood the budget process very well.
- FMS: Half of the 42 respondents had started the process of identifying an FMS, of these most people had chosen an FMS. A bit of a quicker process than the other steps – less than one month.
- Spending Plan: 21 people had started the spending plan step. Half are still working on their spending plans the other half have been submitted or “approved.” Of the 19 respondents 15 thought their spending plan covered the things in their PCP.
- Finding products and services: most had started this step.
- Transition IPP: 17 people have scheduled or held this meeting. Many transition IPP meetings have already happened. 12 People who took the survey have transitioned to SDP!

#### **Agenda Item: Discussion of Use of Second Year Funds from DDS**

The amount allocated to the local advisory committee for use in supporting the roll out to self-determination is \$125,664. Ideas suggested include:

- continued coaching, including in other formats
- advanced training of Independent Facilitators
- translation and interpretation of meetings and documents/materials
- administrative assistance for committee
- website
- another person centered planning facilitator training
- Statewide advisory committee funding
- IT subscriptions
- FMS fee for management of the DDS funds

Time did not allow for a robust conversation on this item. The co-chairs will send a doodle poll looking to find a date for an additional meeting to discuss this item.

#### **Agenda Item: Input on Future Agenda Items**

None

**Agenda Item: Public Comment and Announcements**

Vi announce that she and Melissa would be making a presentation on Self-Determination to HireAble later in May. They are looking for a few 'profiles' of people who have (or are in the process of) transitioning to self-determination to illustrate how self-determination can be used to support people in reaching their goals. If you would like to share your profile for this presentation, which can be done anonymously/de-identified, please let Vi know.

<b>2021 Meetings</b>
May – special added meeting, date to be announced
June 7
July 12
August 2
September 13
October 4
November 1
December 6



## **SELF DETERMINATION PROGRAM**

**Total Participants Successfully Transitioned into SDP: 35**

**\*The following information reflects Participants currently actively in progress to complete transition. Currently Active: 145 Participants.**

**\*Orientations:**

- **141/ 144 Participants completed Orientations**
  - **3 remaining-all English Speaking**

**\*Person Centered Plan Completed:**

- **3 in April 2021**

**\*Individual Budgets:**

- **3 Drafted in April 2021**
- **119 Drafted total**

**\*Spending Plan Completed:**

- **5 completed April 2021**

**Paused further Progress due to COVID-19**

- **0 Paused in April**
- **12 Paused Total**
- **0 new Non Active**
- **3 “reactivated”**

**\*Queued to Transition:**

- **4 for the month of June**

\*Orientations are reported accounting only for active Participants. This report does not reflect Orientations completed by Participants who are inactive.

\*Person Centered Plans are reported accounting for Participants who have expressed they wish a Person Centered Plan. This report does not consider active participation in SDP soft roll out as a desire to have a Person Centered Plan completed.

\*Individual Budgets are reported accounting only for active Participants. This report does not include Individual Budgets that were drafted for inactive Participants.

\* Spending Plans are reported accounting for Participants who have Spending Plans completed, submitted, and reviewed by RCEB only. This report does not reflect Spending Plans in progress.

\*Queued to Transition are reported for Participants who have expressed they would like the Transition on the start date indicated .All Participants reported need a) certified Individual Budget, b) completed Spending Plan c) Signed IPP Signature Page and Person Centered IPP report submitted for a complete transition.

\*\*Non-active: Total non-active since initial DDS selection: 54

**BASED ON TOTAL NON-ACTIVE**

Lives in ICF, does not want to move – 3  
Current services meet needs – 24  
Too much work, currently overwhelmed -  
156 Didn't sign up/didn't know what SDP is – 5  
Transfers out – 9  
Deceased- 1