

Welcome!

## An Overview of Self-Determination Program:

### The Vision, the Value, and the Roll-out for Californians with Intellectual and Developmental Disabilities



Presented by the State Council  
on Developmental Disabilities,  
Bay Area Office

With Slide Content from DDS and  
the RCEB SDAC Independent  
Facilitation Workgroup

# WHAT IS SELF-DETERMINATION

## SELF-DETERMINATION PROGRAM OVERVIEW



CHOICE, CONTROL  
AND RESPONSIBILITY



SERVICES AND  
SUPPORTS THAT  
FIT YOUR LIFE



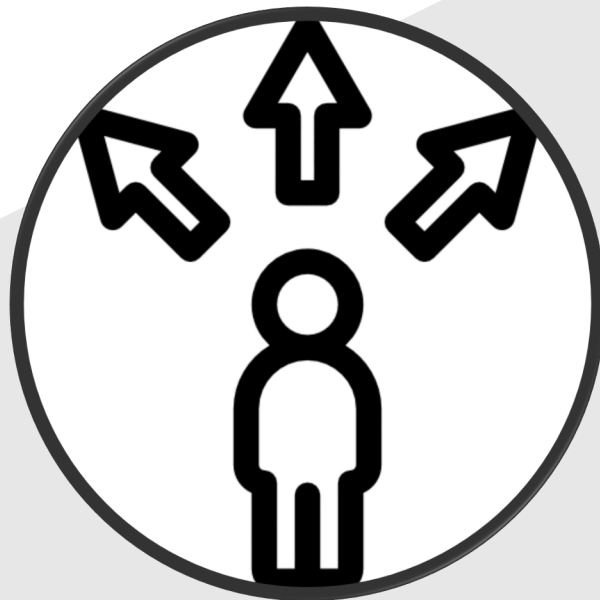
DECIDE HOW  
YOUR BUDGET IS  
SPENT



LOTS OF  
SUPPORT



PERSON  
CENTERED



# WHAT IS SELF-DETERMINATION

## SELF-DETERMINATION PROGRAM OVERVIEW

### Traditional Services

- Person-centered planning
- IPP
- Regional Center
- Vendored providers

### Self-Determination Program

- Person-centered planning
- IPP
- Regional Center
- Vendored or non-vendored providers
- Individual budget
- Independent Facilitator
- Financial Management Service

# The Need for Self-Determination

- Many regional center clients are underserved due to geographic, language, and cultural factors.
- Existing services do not meet many people's unique needs.
- Many people want more control over their lives.
- Many want supports to help them be a greater part of their communities, get jobs, have friends, worship, and have a more meaningful life.

# HISTORY OF SELF DETERMINATION

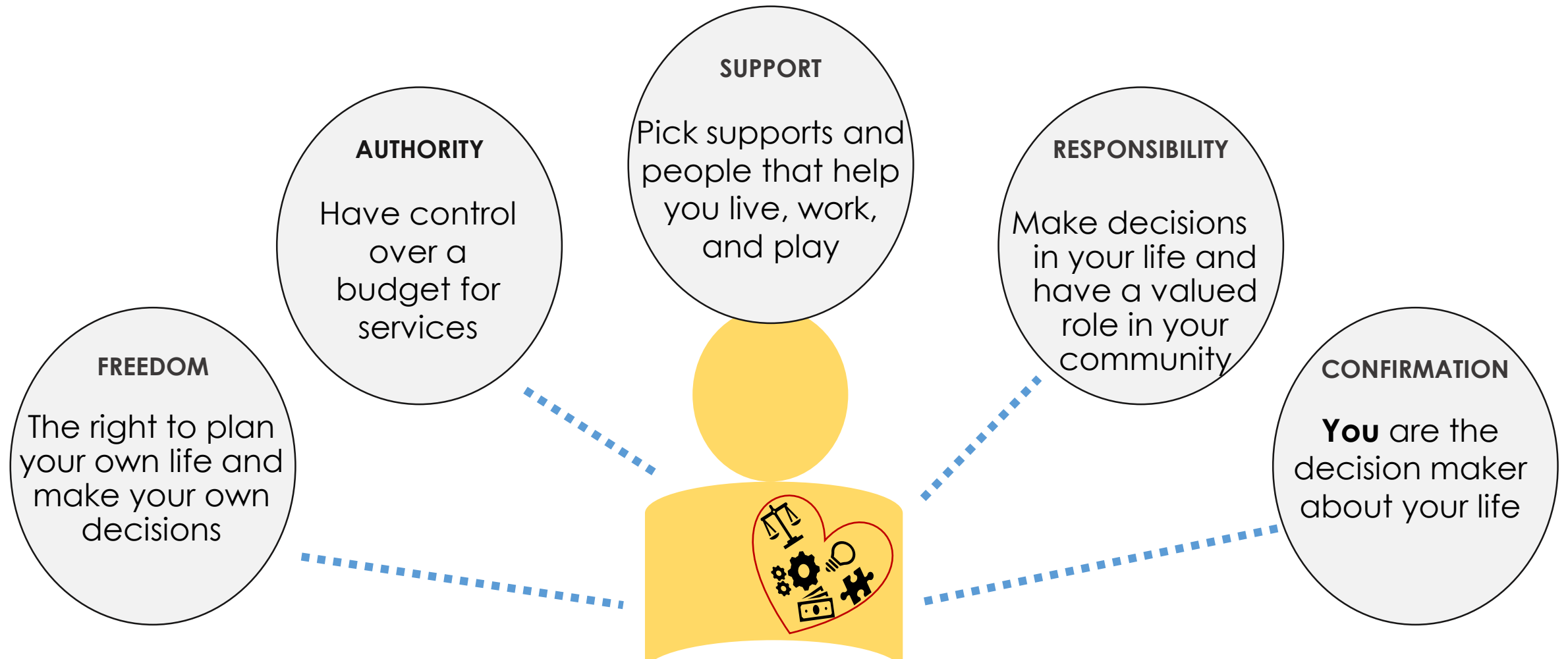
- Lanterman Act (1969) – Historic shift giving more power to people with intellectual and developmental disabilities (IDD). Service decisions made collaboratively with regional center. Enables broad range of community services.
- Self-Determination (2013) – Shifts decision making power to the participant. Gives greater flexibility to design services unique to the person. Regional center role is support, oversight, and administration.

# Struggle for Self-Determination

- Legislature creates Self-Determination pilot programs in 1999.
- Many people who are waiting for expansion of pilots are desperate for Self-Determination.
- Legislative efforts in 2011 and 2013 driven by parent advocates and self-advocates. These efforts captivate IDD advocacy community.
- On October 9, 2013, Governor Brown signs Senate Bill 468 to make Self-Determination available statewide.
- People continue waiting during five-year federal approval process.

# WHAT IS SELF-DETERMINATION

## \*5 PRINCIPLES OF SELF-DETERMINATION



# Self Determination Allows...

**Choice, Control & Access**

Impacting lives for the better

## **Service Dollars**

With Self-Determination, people can spend their service dollars to buy the supports that are right for them.

## **Hiring Workers**

They can hire their own workers, including relatives, neighbors or friends. These can be people who speak their language and know their culture.

## **Hiring Agencies**

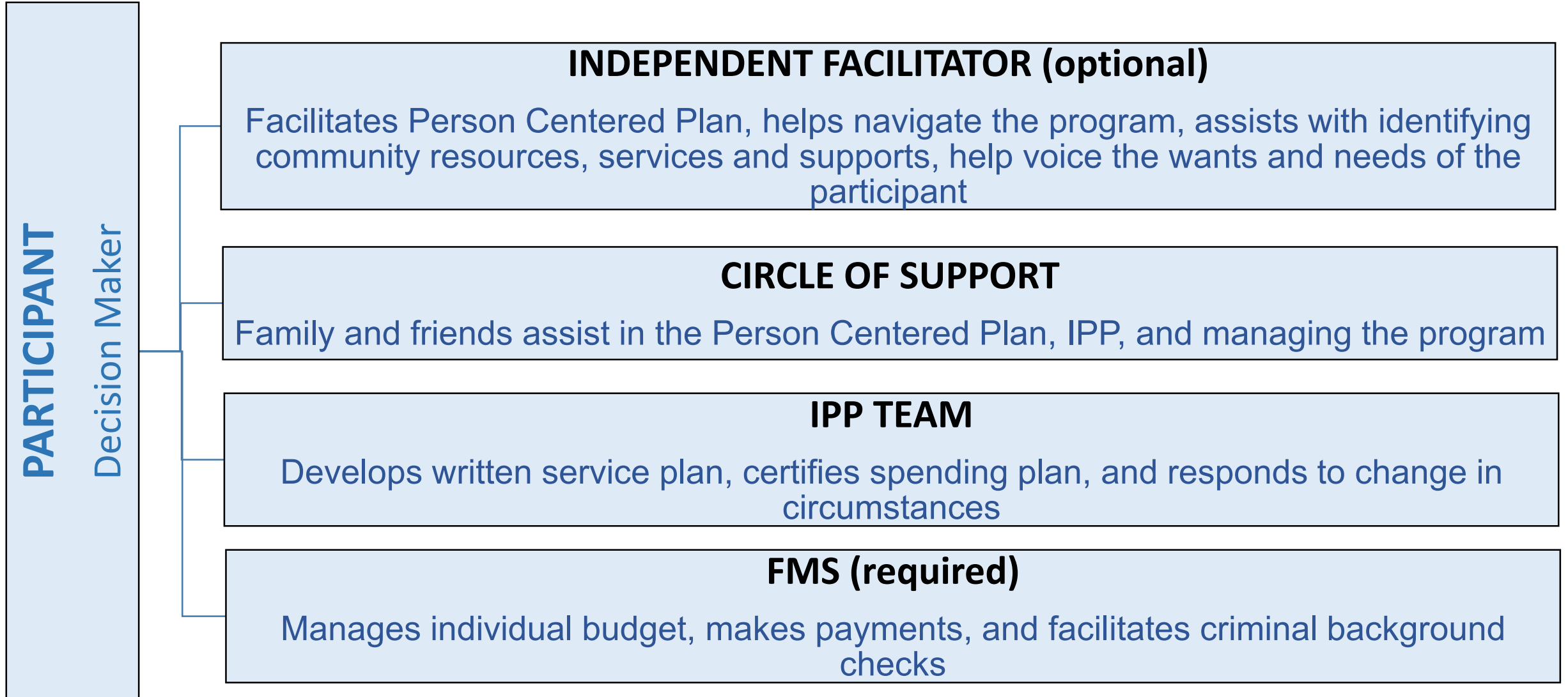
They can contract with an agency for services, and negotiate what to pay, what the services will be and when they receive it.

## **Flexibility**

If a worker or agency isn't a good fit, there is flexibility to find other people or change agencies



# KEY PLAYERS AND ROLES



# ROLES AND RESPONSIBILITIES

## FAMILY, FRIENDS & CIRCLE OF SUPPORT

Who is in a Circle of Support?  
**Anyone the person chooses!**

- People they trust
- People who know them best
- People who can help
- Friends and family
- Teachers, therapists, coaches
- Their service coordinator
- Employer
- Independent Facilitator



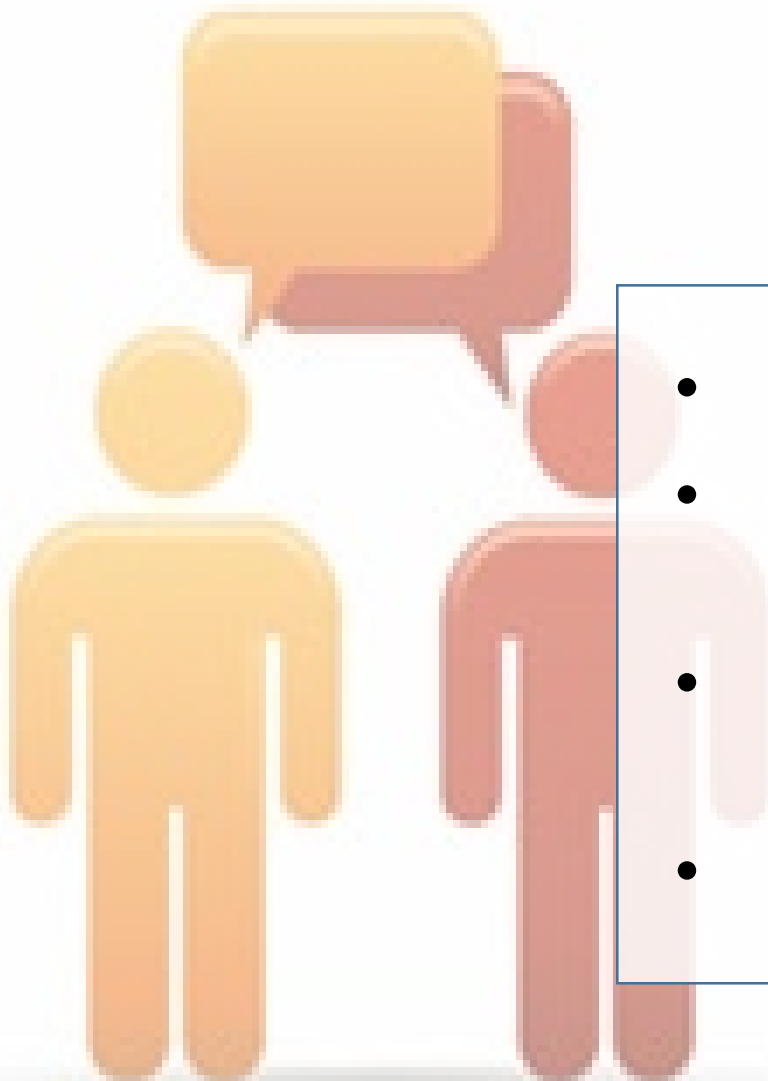
# ROLES AND RESPONSIBILITIES

## REGIONAL CENTER SERVICE COORDINATOR

### Regional Center Role and Responsibility

The regional center still plays an **important** role, by:

- Helping develop the IPP
- Certifying the amount of the individual budget
- Helping people understand what services are eligible for funding
- Helping people to be healthy and safe



# ROLES AND RESPONSIBILITIES

## INDEPENDENT FACILITATOR

### Independent Facilitator Role and Responsibility

Independent facilitator: A person who can help implement a participant's program

They **CAN** help:

- Make informed decisions regarding the individual budget;
- Locate, access and coordinate the services and supports in the IPP;
- Identify needs and finding options to meet those needs;
- By leading, participating in and/or advocating on a person's behalf during the person-centered planning process and when they develop their IPP

They **MUST**:

- Receive training
- NOT provide any other service to the person

They **CAN**:

- Be paid from the spending plan, if hired
- Be a service coordinator
- Be family members

# Who Can Be A PAID Independent Facilitator

- Family members
- Neighbors
- Community members / other professionals
- Service providers who DO NOT provide other services to the person



# Who Can Be An UNPAID Independent Facilitator

- Parent of minor
- Spouse of participant
- Case Manager from Regional Center  
(can provide some of the functions)



# ROLES AND RESPONSIBILITIES

## INDEPENDENT FACILITATOR

### \*Choosing the Right Independent Facilitator

SDP Participants: Think about what **you** need...  
What kind of person would you get along with?

#### WHAT DO YOU **NEED**?

- Do you need help accessing your community or neighborhood?
- Do you need different people to do different things?
- Do you want help with person-center planning?
- Help with advocacy?
- Help in accessing public benefits?

#### WHAT DO YOU **WANT**?

- Someone who is very organized?
- Do you want someone who is calm and gentle?
- Do you want someone who really understands your family?
- Someone who understands your culture?

# ROLES AND RESPONSIBILITIES

## FINANCIAL MANAGEMENT SERVICE (FMS)

### FMS Role and Responsibility

- **The participant chooses** their FMS
- A **required** service for the program
- Is **required** to be vendored
- Participant pays for the FMS out of their spending plan
- The FMS checks background and qualifications
- Helps the person manage their spending plan
- Gives a monthly report about the spending plan

Who will help a participant pay for services / their employees?





# FMS ROLE

## WIC 4685.8 (F)(1) Financial Management Services:



### Spending Plan Management

- ✓ Manage distribution of funds
- ✓ Ensure financial resources to implement IPP
- ✓ Bill Pay Service

### Provider Employment

- ✓ Facilitate employment of workers by participant
- ✓ Facilitate criminal background checks

### Documentation

- ✓ Monthly spending statements to participant and Service Coordinator / Case Manager

# ROLES AND RESPONSIBILITIES

## FINANCIAL MANAGEMENT SERVICE (FMS)

### \*Choosing the Right FMS

SDP Participant: Think about what you **need**...  
AND what you **want**?

#### WHAT DO YOU **NEED**?

- Do you need help with employees?
- Do you need more help or reminders on making sure you keep within your spending plan?
- Do you just need them to pay the bills and send you statements?
- Do you need to buy goods and supplies?

#### WHAT DO YOU **WANT**?

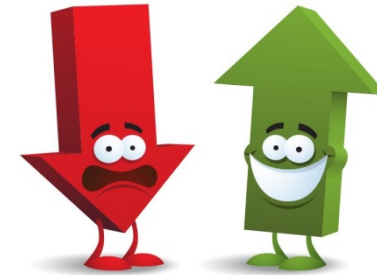
- Full responsibility for your employees?
- Help with the business of having employees?
- Liability or no liability?

# INDIVIDUAL BUDGET



## Determining Budget

- Existing Participants
  - Expenditures over previous 12 months
- New Participants
  - Average of what is spent on those 'with similar needs'



## Changes to Budget

- Unmet Need
  - Needed services in IPP not used
  - Needs weren't addressed in IPP
- Change in Circumstance
  - Major life changes affecting needs

# SPENDING PLAN CATEGORIES

- Living Arrangements
- Employment and Community Participation
- Health and Safety



See handout

# ROLES AND RESPONSIBILITIES

## SERVICE PROVIDERS

### \*Roles and Choosing Service Providers

SDP Participant: Think about what roles you **need** your provider to fill...

#### WHAT DO YOU **NEED**?

- Someone who has a medical background?
- Some who knows your language?
- Someone who drives?
- Someone who can support in personal care?

#### WHAT DO YOU **WANT**?

- Someone who will **not** speak for you?
- Your privacy respected?
- Employees to **not** make personal phone calls or text while working for you?
- Someone who understands your culture?

# ROLES AND RESPONSIBILITIES

## CHOOSING THE RIGHT PERSON FOR THE RIGHT ROLE

### \*Agreements with Service Providers



Expectations  
of the job



Hours and days  
of the job



How you will  
keep track of  
when they work



Start date/end  
date



Rate of pay



Where the  
service will  
take place

# PLANNING

## PERSON-CENTERED PLANNING AND SELF-DETERMINATION



Keeping you at the center of planning, through the person-centered process **YOU** will:

1

Identify your hopes and dreams.

2

Identify what you like and what you're good at.

3

Identify and set meaningful goals for your life.

4

Choose who will provide services and supports.

# PLANNING

## REQUIREMENTS OF PLANNING FOR SERVICES

The services you pay for from your spending plan **MUST**:



\* Be a  
federally  
recognized  
service



Providers  
must be  
qualified



Support  
choice  
and  
inclusion



Can be  
vendored  
& non-  
vendored

**1**

**MUST try to get other sources  
to pay first**  
(called "Generic  
Resources")

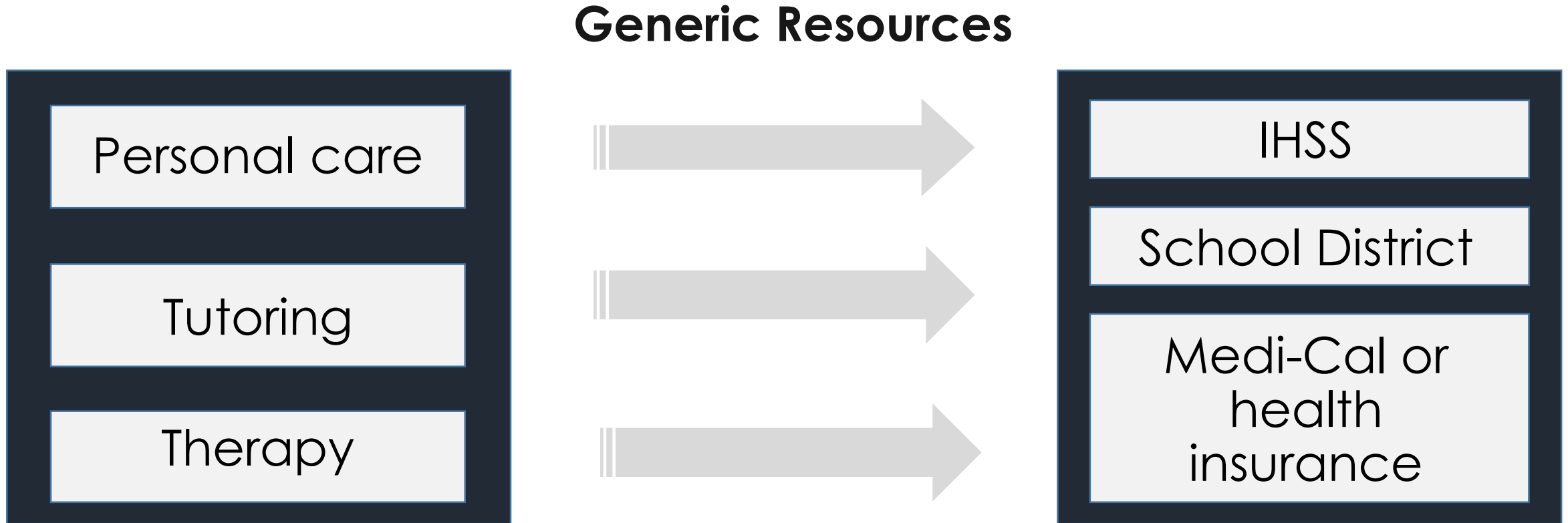
**2**

**MUST be provided in places where  
you are included in the community**  
(called "Final Rule")



# PLANNING

## REQUIREMENTS OF PLANNING FOR SERVICES

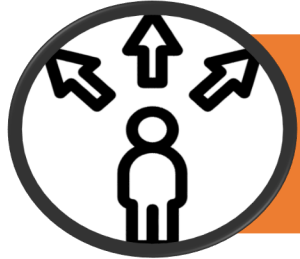


- **SAME** requirement as in the traditional regional center system.
- Helps you **save money** in your spending plan for other things.
- Talk with your team if a generic resource does not meet your needs.

# PLANNING

## REQUIREMENTS OF PLANNING FOR SERVICES

### \* Home & Community-Based Services & the Final Rule



You make your own choices



You live in neighborhoods of your choosing



You have the opportunity to work and volunteer



You are able to make friends with people with and without disabilities

The Self-Determination Program is designed so that **you** are **included** in **YOUR** community.

# PLANNING

## REQUIREMENTS OF PLANNING FOR SERVICES

### Setting Assessment and Process



The provider will complete a self-assessment of the setting



The selected provider, the regional center and **YOU** will conduct an onsite assessment...



If the provider **passes** you can use this service



If the provider **does not pass**, you can work with them towards change. If not you can **NOT** have services in this setting.



The FMS verifies the **completion** of the assessment process

# NEXT STEPS

## SDP LOCAL ADVISORY GROUPS

Make connections with local *support!*



Collaborative/networking meetings w participants, families, IFs, FMS, and service providers.



Monitors the development and ongoing progress of the program.



Can conduct outreach and provide training.



Offer recommendations for ongoing improvement.

- ✓ Sign up for your Regional Center's Interest List.
- ✓ Tell your Service Coordinator you are interested.
- ✓ Attend meetings of your Local Self-Determination Advisory Committee!

# NEXT STEPS

## KEEP AN EYE ON THIS STATE BUDGET

CA's May Revise:

Self-Determination Ongoing Implementation (\$10.3 million TF, \$6.8 million GF):

Funding supports transition support services, improved orientation and training, and participant choice specialists to improve the process for individuals to transition from traditional services to the Self-Determination Program. (Trailer Bill Language)

# CLOSING THOUGHTS

QUESTIONS? THOUGHTS?

**THANK YOU!**

CA State Council on Developmental Disabilities,  
Bay Area Region:

[bayarea@scdd.ca.gov](mailto:bayarea@scdd.ca.gov) 510.286.0439

Local Advisory Committees:

<http://www.ggrc.org/services/self-determination#SDLAC>

<http://www.rceb.org/self-determination>

DDS Website: [www.dds.ca.gov/sdp](http://www.dds.ca.gov/sdp)