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

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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*

**FREEDOM**
The right to plan your own life and make your own decisions

**AUTHORITY**
Have control over a budget for services

**SUPPORT**
Pick supports and people that help you live, work, and play

**RESPONSIBILITY**
Make decisions in your life and have a valued role in your community

**CONFIRMATION**
You are the decision maker about your life
Self Determination Allows:

- **Choice, Control & Access**
  - **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

PARTICIPANT

Decision Maker

INDEPENDENT FACILITATOR (optional)
Facilitates Person Centered Plan, helps navigate the program, assists with identifying community resources, services and supports, help voice the wants and needs of the participant

CIRCLE OF SUPPORT
Family and friends assist in the Person Centered Plan, IPP, and managing the program

IPP TEAM
Develops written service plan, certifies spending plan, and responds to change in circumstances

FMS (required)
Manages individual budget, makes payments, and facilitates criminal background checks

Overview
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
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
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)
### Choosing the Right Independent Facilitator

**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?

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

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

1. Be a federally recognized service
2. Providers must be qualified
3. Support choice and inclusion
4. Can be vendored & non-vendored

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

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

**MUST**
- **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.
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
You make your own choices

* Home & Community-Based Services & the Final Rule

The Self-Determination Program is designed so that you are included in YOUR community.
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!
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)
CA State Council on Developmental Disabilities,
Bay Area Region:
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