

**Self-Determination Local Advisory Committee**  
**Meeting Minutes**  
**Friday, March 21<sup>st</sup>, 2025**  
**10:00 a.m. to 12:00 Noon**

Recorder: Maria Hernandez

In-Person and Zoom Meeting

**Present:**

**COMMITTEE MEMBERS (\*=Appointed By):** Robert Miland Taylor (RCRC\*), Pam Jensen (SCDD\*), Erin Moynahan (SCDD\*)

**REPRESENTATIVES TO THE COMMITTEE:** Sheila Keys (RCRC), Alex Ostell, (RCRC), Patricia Kamlley (DDS), Julie Eby-McKenzie (SCDD), Maria Hernandez (RCRC)

**COMMUNITY MEMBERS PRESENT:** Sonia Lopez (Translation), Jo Pourian (RCRC), Sherry Erickson,

**Absent Committee Members:** Frank Van Curen (SCDD\*), Clifford Black (OCRA), Crysalyne M (OCRA), Chris Miller (RCRC\*)

**Common Abbreviations:**

**CRA** (Client Rights Advocate), **DDS** (Department of Developmental Services), **DVU** (Disability Voices United), **FMS** (Financial Management Services), **FRC** (Family Resource Center), **IF** (Independent Facilitator), **PDS** (Participant Directed Services), **PCM** (Participant Choice Manager), **PCT** (Person Centered Training), **RC** (Regional Center), **RCRC** (Redwood Coast Regional Center), **SC** (Service Coordinator), **SCDD** (State Council on Developmental Disabilities), **SDAC** (Self-Determination Advisory Committee), **SDP** (Self-Determination Program), **SSDAC** (Statewide Self-Determination Advisory Committee)

**Minutes:**

1. **Welcome, Introductions, Roll Call, and Select a Timekeeper (Sheila):**
  - a. Introductions were made by those present during today's meeting.
  - b. The SDAC did not have a quorum for the meeting so there were topics which the group was not able to discuss.
2. **Review, Discussion and Approval of January 2025 Minutes (Chris):**
  - a. Bypassed, the committee did not have a quorum to review and vote for the approval of the meeting minutes.
3. **Update on February Action Items (Alex):**
  - a. **ACTION: Erin will reach out to Michael Shanahan, Mendo Leap, and First 5 to discuss the idea of Round Tables. – Yes. Erin reached out to Mendo Leap and First 5 and they were receptive regarding the roundtables for Self-Determination. Erin was unable to reach out to Michael Shanahan.**
  - b. **ACTION: Sheila will meet with Erin about Self-Determination and Sheila will send an email to anyone in SDP or the public to let them know when the board meeting is so that they have the option to attend. – Completed.**

4. Participant and Family Sharing – What’s Working and What’s Not Working (Community):

- a. Pam invited Emily Ockey today regarding the board meeting to see how we can be more coordinated. Emily presented to the board regarding her experience with Self-Determination.
  - i. Emily shared that she did not know about Self-Determination and found out about it by accident. She had previously had a Service Coordinator who was out at that time and met with her fill-in worker that Dwayne Nelson had talked to her about it. Her fill in SC spoke to her about Self Determination and she then began to fill out the forms where she began the process.
  - ii. She informed the committee that she has had many issues with the FMS, more than she has had solutions. An example would be to have to do six incorrect contracts with one vendor and the vendor did not know what they were doing.
  - iii. Emily suggests that there needs to be more oversight with the funding that FMS receives because clients are not receiving services.
- b. Emily said she is happy with SDP as the individual Program Model has worked for them and that she would like for Self-Determination to offer an orientation process to help families and clients who would like to be a part of it or are just looking for more information.
  - i. Diana Perez asked Emily to send her an email so that they could further discuss the issues Emily has been having.
- c. Claire Seo asked if we have a Mentoring System for Parents to Parents as this has helped parents who are new to the system.
  - i. She also informed Emily that one of the best solutions is to switch FMS as this has helped many people who have had the same type of issues with their current FMS’.
- d. Pam suggested that we discuss issues similar to those that Emily with her FMS. How can they switch over without it being disruptive to their child’s life and how can we provide support?
  - i. Sheila mentioned that we could be creative with how we can provide support for Emily and those who would like to join.
- e. Leti shared her experience with SDP. She is working with Michael, an Independent Facilitator, and is already receiving help from him even though RCRC is taking a little longer.
  - i. Leti shared that she would like IFs to train IFs within the community. She also talked to the RCRC Director about having the conversation regarding SDP at the first IPP meeting.

5. State Council Report (Julie):

- a. The orientation may be undergoing some revision. When a family or person goes through the orientation, they must submit their UCI to receive the certificate of completion. The reasons for the delay in completion may be due incomplete survey responses.
- b. Julie reported that the sessions emphasize Responsibility, Collaboration, and Communication that were mostly developed by DDS.
  - i. The State council now could track who takes the orientation.

- ii. They will also include more about abuse reporting and the Medicaid Waiver.
    - iii. The State Council is also still managing the Statewide meetings that Chris attends.
  - c. The June meeting still has not been announced.
    - i. Sheila heard that the meeting in June may be in person in Southern California and would like for the people who will be attending the meeting to have enough time to make travel arrangements.
6. Co-Chair Update (Chris):
- a. This topic was not discussed as we did not have a quorum.
7. RCRC Board Meeting (Robert):
- a. Sheila mentioned that the meetings that are in person in Fort Bragg and Eureka, there is a zoom link where you can join. There will be one in May in Fort Bragg and one in September in Eureka.
  - b. Robert informed the group that he will not be able to attend the Board meeting in May as he will be attending the People First Conference.
  - c. Robert said that the regulations have changed regarding chat and time limits.
- ACTION: Robert will send an email to Sedona about assuring that the speakers who are presenting are getting their 5 minutes to speak.**
- ACTION: Sheila, Robert and Pam will coordinate the schedule for people who will be speaking at the next Board Meeting. Pam will contact Kristy and Debbie to see if they have another person who is willing to come to the Fort Bragg meeting or she will contact Willy to see if he is willing to come to the meeting.**
8. How to Include SDP in RCRC Intake Process:
- a. Pam asked Jo how SDP can be included in the Intake Process.
    - i. Jo shared what the Intake Process is like. Intake Specialist do the initial Intake Appointment where they meet with the family and the client to get further information to determine where the areas of need are before the client gets referred to meet with our Clinical Psychologist.
    - ii. She informed the group that the Intake Process is to determine whether a client is eligible for services or not.
    - iii. A packet about Self-determination is included at the Initial Intake Appointment that shares a brief overview about what it is. The packet includes Sheila's and Alex's Information.
    - iv. Jo shared that the biggest concern or barrier would be that there is a lot of information during the intake appointment.
  - b. Jo informed the group that she and Alex have talked about flagging clients that may benefit from SDP after the Initial Intake Appointment. This is after they are found eligible to access any services through Self-Determination.
    - i. If the client is found eligible and they would benefit if they have limited service options or they want to hire someone rather than traditional services, they would be flagged so that once the case is transferred over to the Service Coordinator and the Manager of the unit, the Intake Specialist will let them know that the client will benefit in having a conversation regarding Self-

Determination at their initial IPP. Thus, making the Initial IPP the meeting where the conversation about Self-Determination is most important.

- c. Alex asked Jo to speak about the number of referrals received to start the intake process vs the number of people who end up being regional center clients. She also mentioned that RCRC is trying to be better about outreach with our community partners and being informed about our community and who we can serve.
  - i. Jo informed the group that the amount of people being referred to and being eligible is about 50/50. She mentioned that per the Lanterman Act, there are some very specific eligibility criteria that someone would need to meet to be eligible for services.
  - ii. Pam asked about what the numbers are roughly looking like. Jo let her know that she has about 70-80 cases on her caseload and getting 4/5 referrals a week, sometimes up to 10. The intake specialists are trying to do six or seven intakes a week with new referrals coming in and will sometimes have to schedule people a month to two months ahead.
- d. Pam asked if the Service Coordinators are doing the intake appointments. Jo confirmed that the Intake Specialist does the Intake Appointment in observation style and then the Intake Specialist will refer the client to the Clinical Psychologists who will do an assessment to see if they have a developmental disability, after that the Intake Specialist will meet with the eligibility team to review the information. If they are found eligible, the Intake specialist will transfer their case to the appropriate unit where they're assigned a Service Coordinator who will then do the client's Initial IPP.
  - i. Jo informed the group that flagging clients will be important so that when the case is transferred to client services, they Service Coordinator will know that having the SDP conversation to include in the Initial IPP meeting will be important as the client will benefit from having the conversation or because the client may want to be part of the Self-Determination Program.
- e. Clair pointed out that for most cases, it is recommended to do traditional services for the first year or at least six months to know what is available through the traditional system. When it doesn't work out or they are interested in Self-Determination, then the transfer can happen.
- f. Alex spoke about how a client may go directly into Self-Determination but there still may be a four- or five-month assessment process about what the services' needs are.
- g. Bonnie Boek, from Raise & Shine FREC, shared that they offer one-on-one support for families that are clients of the Regional Center or the school systems to help them navigate through the processes.
- h. Pam recognized that after listening to Lety and Emily speak, there are many families who are interested in Self-Determination and would like as a group to consider ways to access these groups to help get them informed.

9. Start-Up Funding for IF/FMS Agencies, Updates and Approvals/DDS Funding to Support

Implementation of SDP Update (Sheila/Alex):

- a. Sheila informed the committee that Rhiannon Morsh, from Life Leap Services, has the contract in place. IFs are being referred to have support from Rhiannon.
- b. Rhiannon requested that the SDAC review and consider Josh for approval. He has experience with disability services and disabled adults in care homes as a master's curriculum design and education. He has designed and taught classes on ecology as well as music for the youth.
  - i. Josh is located in Sonoma County who is wanting to become an IF.
  - ii. He may be willing to travel to Mendocino and Lake County but Sheila will be getting further information on that.

**ACTION: We will wait until the next meeting to vote regarding Josh becoming an IF.**

- c. Sheila also informed the committee that there are several people who will be enrolling within the next month or two.
- d. Sherry mentioned the idea of having support groups for people who want to become FMSs. Sheila agrees and likes the idea.
- e. Julie from SCDD mentioned that there are Regional Centers that get Promotora programs to help IF's. Sheila mentioned that First 5 may be able to help with creating a support group as they have some structure already in place for other groups.
  - i. Sheila explained the process to approve this service. It would be a contract just like with Rhiannon for the mentoring.
  - ii. The Advisory Committee would approve the project and then it would get funded through the Ops funds that DDS gave SDAC for implementation.
  - iii. Once it has been approved, a structure would need to be created so that a group or company or person will take care of organizing and getting it set up and running.
- f. The committee will be discussing this topic at the meetings so that we can begin the process.

10. Update on SDP Participant Transition, Status of Independent Facilitators and FMSs, and Report on Self-Determination Conversations Meetings (Sheila/Alex):

- a. Orientations update:
  - o Orientations update: 0 people reported to have attended the SCDD Orientation <https://scdd.ca.gov/sdp-orientation/>
- b. Enrollments update:
  - i. New enrollments since Jan 17th: 0
- c. Independent Facilitator Update:
  - i. Several new IFs are being vendored or have started training..
- d. FMS Update:
  - i. Up to 14 FMS options. 2 more are close to being vendored that were funded through Statewide Request For Proposal.

11. DDS Directives (Sheila/Alex):

- a. Due to time, we were unable to discuss this topic.

12. Resource Sharing/Community Input (Community):

- a. Due to time, we were unable to discuss this topic.

13. Add/Remove Agenda Items for Next Meeting (Committee):

- a. Substitute “How to Include SDP in RCRC Intake Process” to “How to Support People to Help Others in Their Communities”

14. Meeting Recap (Action Items below):

- a. **ACTION: Robert will send an email to Sedona about assuring that the speakers who are presenting are getting their 5 minutes to speak at the board meeting.**
- b. **ACTION: Sheila, Robert and Pam will coordinate the schedule for people who will speak at the next Board Meeting. Pam will contact Kristy and Debbie to see if they have another person who is willing to come to the Fort Bragg meeting or she will contact Willy to see if he is willing to come to the meeting instead.**
- c. **ACTION: We will wait until the next meeting to vote regarding Josh becoming an IF.**

15. Adjourn the meeting (Pam):

- a. Meeting was adjourned by Pam at 12:02 pm.

**The next meeting is set for April 18<sup>th</sup>, 2025.**

*SDAC Mtg Minutes\_2025\_03\_21*

*Prepared by: M. Hernandez (4/4/2025)*