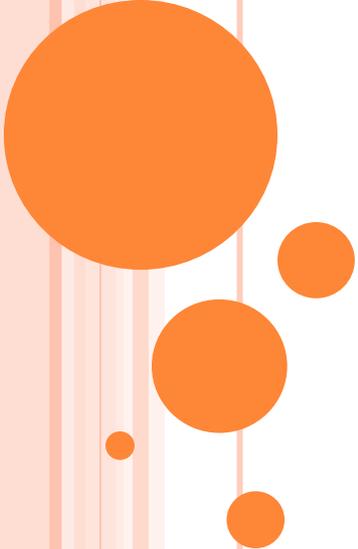


WELCOME TO SCLARC'S PERSON-CENTERED PLANNING (PCP)/INDEPENDENT FACILITATOR (IF) TRAINING AND MEET AND GREET!

- The meeting will begin at 6:00pm
- All participants are muted upon entry; we will give people the ability to unmute themselves at specific points in the presentation in order to ask questions.
- You may also enter questions in the chat box; this is being monitored by SCLARC staff throughout the presentation.
- For specific case management concerns, please contact your Service Coordinator. If you are having difficulty with that, please contact SCLARC's Case Management Helpline, available in English and Spanish, at 1-833-725-2721 or cmhelp@sclarc.org
 - For questions about Self-Determination, please contact SelfDetermination@sclarc.org or Naomi Hagel (323-998-9519/NaomiH@sclarc.org)
- **All participants and presenters are expected to be respectful and professional at all times towards SCLARC staff and all others. Failure to do this will result in one (1) verbal warning. If the conduct continues, the offender will be removed from the meeting.**
- The presentation will be emailed out to all attendees later this week, with any and all content from presenters included, as well as contact information for the presenters.





**PERSON-CENTERED PLANNING
(PCP) AND INDEPENDENT
FACILITATION (IF) IN THE SELF-
DETERMINATION PROGRAM (SDP)**

**South Central Los Angeles Regional Center
(SCLARC)**

WHAT IS PERSON-CENTERED THINKING AND PLANNING?

- Person-Centered Thinking and Planning is an ongoing process that helps an individual and their circle of support to develop a detailed outline of the life an individual wants to live and the services and supports they will require in order to reach their goals and dreams.
- The process of Person Centered Planning includes identifying what is important to an individual, including those things that make them happy and satisfied, as well as what is important for an individual, which are the necessities that keep a person healthy and safe. It is critical to strike a balance between them in everyone's life.



HOW IS THIS DIFFERENT FROM AN INDIVIDUAL PROGRAM PLAN (IPP)?

- Traditionally, Regional Center (and many other) services have utilized the “medical model,” which focuses on what is “wrong” with an individual and how we can “fix” it.
 - People aren’t broken, and they don’t need to be fixed!
- SCLARC has committed to becoming a person-centered agency, which means that all staff have undergone training in person-centered thinking and strategies.
 - SCLARC also has credentialed Person-Centered Thinking trainers on staff (including bilingual trainers), which will allow for ongoing coaching of staff and families.
 - As part of this process, SCLARC is currently working on developing an IPP template that is more person-centered, which is anticipated to be rolled out during the next fiscal year.



HOW IS THIS DIFFERENT FROM AN INDIVIDUAL PROGRAM PLAN (IPP)? (CONTINUED)

- When completing an IPP, staff have only limited time (approximately two hours) to gather all of the necessary information, pursuant to the amount of time that is allowed under Department of Developmental Services (DDS) regulations; in addition, IPP meetings are typically held over one day. This does not mean a Service Coordinator (SC) will not take more time with you if you need it, however, including scheduling a second meeting with you if required.
 - PCPs, on the other hand, are more detailed, frequently longer (several hours), and may include several meetings.



HOW IS THIS DIFFERENT FROM AN INDIVIDUAL PROGRAM PLAN (IPP)? (CONTINUED)

- Person-Centered Planners are expected to have more extensive training in Person-Centered Thinking than the overview training provided to staff. They may also have more experience, i.e. have been practicing this type of thinking and work for several years.
- IPP documents focus mostly on what Regional Center-funded services and supports are being provided, are required or requested, etc. While a PCP may also discuss this, it will also focus, more broadly, on overall goals, and other services and supports and individual may need.



HOW IS THIS DIFFERENT FROM AN INDIVIDUAL PROGRAM PLAN (IPP)? (CONTINUED)

- While you are always welcome to have whoever you would like to attend an IPP meeting with you and help advocate, the PCP really encourages the contributions of the “circle of support.” The circle of support are the people who are important to an individual and provide assistance to them, joy to their life, etc. This might include relatives, teachers, therapists, siblings, respite workers, friends, neighbors...
- The Service Coordinator *may* attend a Person-Centered Planning meeting, if you request them to. However, that is your choice, and you are not required to have them there.
 - Only people the individual receiving services is comfortable with attending should be at a Person-Centered Planning meeting (or an IPP, for that matter!)



PERSON-CENTERED PLANNING IN THE AGE OF COVID-19/CORONAVIRUS

- Many Person-Centered Planners have shared that there are unexpected benefits to conducting PCPs virtually due to the virus.
 - It is easier to coordinate schedules for the circle of support to attend when it is virtual rather than people having to travel, etc.
 - People who might not otherwise be able to attend (i.e. due to distance) are able to be involved, providing richer and deeper input as a result.



THE ROLE OF THE PCP IN THE IPP

- You will still have an IPP under Self-Determination (SDP); the Service Coordinator (SC) will create it as one of the last steps before your transition into SDP.
 - Goals and information from your PCP will be incorporated into your IPP.
- All participants in the program will have a new IPP completed; however, services are still held to the Lanterman Act, and as such, if you are due for a new IPP, annual contact meeting, or quarterly visit prior to transitioning into SDP, the meeting will still need to occur in order to continue your services, in addition to the new IPP you will have.
 - These meetings are being held via telephone or videoconference during the pandemic, pursuant to DDS waivers.



WILL EVERYTHING IDENTIFIED IN MY PCP BE FUNDED BY REGIONAL CENTER?

- Not necessarily
- Services are still held to the Lanterman Act in general.
 - Therefore, generic resources (school districts, Medi-Cal, private insurance, California Children's Services (CCS), Department of Rehabilitation (DOR), In-Home Supportive Services (IHSS), etc.) are required to be utilized, including written proof of denial, before SCLARC can consider funding services.
 - Even if services are denied, it does not necessarily mean the Regional Center will fund the services.
 - *This is still required for educational services for children between the ages of 3 and 22 even during the pandemic, as the Individuals with Disabilities in Education Act (IDEA) remains in effect.*



WILL EVERYTHING IDENTIFIED IN MY PCP BE FUNDED BY REGIONAL CENTER? (CONTINUED)

- Typical parental responsibility still must be considered when funding services (i.e. assistance at Disneyland vs. funding for Disneyland itself)
- The need must be related to the disability.
- In addition, SDP is held to certain other rules.
 - Certain services are age-limited in SDP (i.e. OT, PT, speech, dental services...), as well as overall in the Lanterman Act (i.e. Independent Living Services (ILS)/Employment Services)
 - All services must be federally reimbursable (i.e. rent and food cannot be funded)
 - Experimental treatments are prohibited (i.e. vision therapy, supplemental dietary adjustments, etc.)
 - The services are required to be cost-neutral when compared to the traditional service delivery system
 - This means that while you may use your budget to pay for certain items that are currently prohibited from being funded under traditional services (such as swimming, horseback riding, social/recreational services, etc.), your budget will not be *increased* to account for these costs; you will need to adjust other areas to account for these costs.



AM I REQUIRED TO HAVE A PCP COMPLETED BEFORE STARTING SDP?

As part of the Self-Determination Program, participants agree that their IPP will be created utilizing the Person-Centered Planning process; at this time, SCLARC has elected to use outside Person-Centered Planners to ensure this is done.

- This is part of the responsibilities of the participants that is discussed at the orientation each participant is required to attend prior to transitioning into the program.



WHEN SHOULD MY PCP BE COMPLETED?

Once you have completed the orientation, the Person Centered Plan is the next step to receiving services under Self-Determination.



HOW IS THE PCP PAID FOR?

- Typically, an individual or family does not have to pay up-front for Person-Centered Planning services for Self-Determination.
- SCLARC is currently able to pay up to \$2,500 per Person-Centered Plan
 - This is paid for out of traditional services, *not* your individual budget for Self-Determination Services for the next 12 months
 - However, the cost of the plan also will not be included in your budget for the next 12 months, as it is considered, in the DDS budget tool, to be a one-time cost.



HOW IS THE PCP PAID FOR? (CONTINUED)

- Under the Lanterman Act, in traditional services, SCLARC is only able to pay for services from vendored providers.
- There are two types of vendorizations for Person-Centered Planners:
 - 102/Individual and Family Training: These are individuals and organizations where SCLARC has vetted their qualifications and training, has determined the rate they will charge, and is able to vouch for the quality of their work.
 - 024/Purchase Reimbursement: This is available to providers who do not wish to, or are not able to, go through the full vendorization process. It allows SCLARC to pay the provider directly.
 - While SCLARC may request some information from the provider to determine whether they are qualified to provide the service, SCLARC is not able to vouch for the quality of the provider's work. It is up to the individual and family to ensure qualifications, etc.
 - You will also negotiate the rate to be paid. This can range from \$25 to \$75 per hour, or a flat rate, but should not exceed \$2,500.



HOW IS THE PCP PAID FOR? (CONTINUED)

- If a provider has a vendor number at another Regional Center, it is possible for them to be “courtesy vendored” at SCLARC for payment purposes.
 - A provider must first be vendored at their “home” Regional Center (i.e. if their business is in Westside Regional Center’s catchment area, WRC must complete the process with them) before another Regional Center can vendor them.
- Some providers choose not to be vendored at all, even under 024; this is their choice.
- The 024 Vendorization Process does require some paperwork, including a background check, which not all providers are able or willing to complete.
 - If a provider declines to receive a vendor number for 024/Purchase Reimbursement, a participant may still choose to use them – however, in order to pay for the plan, SCLARC will need to vendor the individual or family member themselves.
 - Please notify your SC as soon as you have selected a Person-Centered Planner. This will allow SCLARC to do the necessary background work to ensure prompt payment to the provider.



HOW IS THE PCP PAID FOR? (CONTINUED)

- SCLARC will not pay for a PCP until after it is completed, SCLARC receives a copy of the plan and the invoice, and the individual/family's satisfaction with the plan is verified.
- **The Regional Center is only able to pay for PCP services up to \$2500.00 and cannot compel a provider to refund the cost later if the family is unsatisfied, etc. Therefore, it is critical that you interview your provider and choose wisely, as the contract is between you and the provider.**
- Some PCPs will not provide a copy of the plan to SCLARC directly, while others will, after having the individual/family sign a release of information. If you select a provider that does not provide a copy to SCLARC directly, please make sure that you do so promptly, in order to assist us with reimbursing the provider in a timely manner.



WHAT HAPPENS AFTER THE PCP IS COMPLETED?

- When SCLARC receives a copy of the PCP and satisfaction is confirmed with the family, SCLARC aims to complete all necessary paperwork to pay the provider within 10 business days.
- Simultaneously, a tentative budget will be requested from SCLARC's fiscal department, including the cost of services provided to the individual over the last 12 months.
 - This may take up to 10 business days to receive.
 - SCLARC will then review the last IPP/reports, the PCP, and the budget to determine if there are any “unmet needs” or “changes in circumstance” that need to be added in to the budget .
 - Upon completion of this, SCLARC will then schedule a budget meeting with the individual and their circle of support (including the Financial Management Service (FMS) when possible) to review the budget, explain the funds available over the next 12 months, discuss the PCP, etc.
 - If the budget is agreed upon, it is signed by the Regional Center and the individual/authorized representative, and a spending plan can then be developed; once a spending plan is certified, the IPP is completed, and SDP services can begin.
 - These meetings are being held virtually at this time; meetings are held in the preferred language of the participant and Circle of Support.



WHAT IS AN INDEPENDENT FACILITATOR (IF)?

- An Independent Facilitator is a unique service available only to participants in the Self-Determination Program (SDP).
 - An Independent Facilitator can assist an individual with transitioning into SDP, finding resources, negotiating rates, Person-Centered Planning (PCP), advocacy at an Individual Program Plan (IPP) meeting, and other tasks that might be selected by a participant or their Circle of Support.



WHAT IS THE DIFFERENCE BETWEEN A PCP AND AN INDEPENDENT FACILITATOR (IF)?

- Independent Facilitators assist with searching for services, negotiating rates, advocating at PCPs, Individualized Education Plan (IEP) meetings, IPPs, etc.
- Some IFs are also PCPs, but some are not; IFs are required to have training in Person-Centered Thinking and Planning, at their own expense.
- Some PCPs choose to assist with advocating, securing services, etc., until the budget is certified and spending plan in place before ending their participation.
 - Other PCPs will transition to becoming IFs (paid or unpaid) once the individual is transitioned into SDP.
- Other PCPs choose to write the plan and have others take over at that point.
 - It will be up to the individual and circle of support to determine what type of PCP/IF relationship is most appropriate and beneficial for their unique needs.



IS AN INDEPENDENT FACILITATOR REQUIRED?

- In short: No
 - A participant may choose not to have an Independent Facilitator
 - A participant could also choose to have their Service Coordinator (SC) serve in the role of the Independent Facilitator
 - Even if the participant chooses an outside IF, they will still have an assigned SC and the support of the RC. (The SC may change due to the participant's transition into SDP.)
 - If the SC is requested to serve as the IF, this service will be provided at no cost to the participant. However, their role is limited. Specifically:
 - The SC will not be able to scout for new services in the community.
 - The SC will not be able to negotiate rates for services.



PAYMENT OF AN IF

- An IF does not necessarily need to be paid; someone may volunteer to serve in this role, or, if the SC is selected as the IF, they will not charge for this service.
- If the participant or their circle of support chooses to pay an IF, the payment is made from the individual budget/spending plan.
- Per the Lanterman Act, the individual budget may not be increased to account for these costs.



PAYMENT OF AN IF (CONTINUED)

- There are no set rates for an IF; the participant and their circle of support will choose how much to pay the IF. It may depend on how much the IF is being asked to do. Different IFs may charge different amounts.
- IFs are not vendors of Regional Center, and cannot be paid from Regional Center Purchase of Service (POS) funds until after the individual has successfully transitioned into SDP.
- The IF will be paid for by the Financial Management Service (FMS)
- If the IF is also the PCP, they may be paid for that service separately prior to transitioning into SDP.



WHO CANNOT BE AN IF?

- An IF is required to be truly independent to ensure they are acting in your best interests and there are no conflicts. As such, they cannot provide any other service to you under your IPP, i.e. they cannot also be your respite provider or work with you on independent living skills. They also cannot work for any agency that provides you services under your IPP.
 - This includes that an IHSS provider also may not be a paid IF.
- The parent of a minor child participant, as well as the spouse of a married participant, may not be **paid** to be an IF, but they can assist with facilitating the participant's plan as an unpaid support.



IF TRAINING

- Per the Lanterman Act, an IF is required to have training at their own expense in:
 - The Person-Centered Planning Process
 - The Principles of Self-Determination
- Responsibilities of an Independent Facilitator, including:
 - Locating, accessing, and coordinating services and supports consistent with the participant's IPP
 - Identifying immediate and long-term needs and developing options to meet those needs;
 - Leading, participating, and/or advocating on behalf of participants in the person-centered planning process and development of the IPP; and,
 - Obtaining identified services and supports.
 - Any other tasks a participant may request of them.



IF TRAINING (CONTINUED)

- Regional Center is not able to pay for the training of an IF under either Traditional Services or SDP
- If someone is interested in becoming an IF and needs training, they may contact SCDD or find other generic resources that are available.
 - IF training has moved online during the COVID-19 pandemic!



IF TRAINING (CONTINUED)

- An IF is not required to have a certificate to show completion of training, but some may; it is up to you whether you choose to use someone who does or does not have a certificate.
- SCLARC is currently working on making cost-effective and culturally-sensitive training for IFs available in order to increase capacity in the catchment area.



HOW CAN I FIND A PCP OR IF?

- In a few minutes, several PCPs and IFs will present on their services; their names and contact information will be displayed on the screen while they are speaking. A copy of this PowerPoint will also be sent out after the meeting.
- After this meeting, SCLARC will send out a list of Person-Centered Planners and Independent Facilitators that it is aware of.
 - You are not required to use a planner from this list, however. You may search for another appropriate Person-Centered Planner or Independent Facilitator.
 - If you would like to receive recommendations from other participants and connect with other individuals in the SDP, you are encouraged to attend the monthly Self-Determination Local Advisory Committee Meetings, held on the second Wednesday of every other month, currently via Zoom.
 - Another reference point is the State Council For Developmental Disabilities' (SCDD) Facebook Group at <https://www.facebook.com/groups/CA.SDP.Forum>
 - You may also search the internet for other Person-Centered Planners and Independent Facilitators.
 - Make sure to verify qualifications, that they will meet your needs, and inform your Service Coordinator of your selected provider.



WHAT TO CONSIDER WHEN HIRING A PCP, IF, OR ANY SERVICE PROVIDER

- When choosing a PCP or IF, you may want to interview several, and ask them questions, such as:
 - How much do you know about California's SDP?
 - *You want to make sure they understand the principles of SDP, and how the program is different from the traditional Regional Center system. For example, the SDP participant is in charge of who gets hired and supervising staff and agencies. Bills go to an FMS and rates may not be the same as what SCLARC is paying under the traditional system. Services must ensure community inclusion. Providers do not have to be vendors nor have contracts with the Regional Center.*
 - What languages do you speak?
 - What experience have you had as a PCP/IF?
 - Have you had any training to be a PCP/IF?
 - Have you ever facilitated a PCP? How many?
 - What is your style?
 - How do you prepare?
 - How well do you know my community?
 - Are you aware of activities in my area that I might be interested in?



WHAT TO CONSIDER WHEN HIRING A PCP, IF, OR ANY SERVICE PROVIDER (CONTINUED)

- Some more questions you may want to ask...
 - How would you go about helping me to find services to help me meet my goals?
 - How will you help me figure out my budget and spending plan?(If you are a Person-Centered Planner, will you also serve as an Independent Facilitator?)
 - Can you advocate for me at my IEP and IPP?
 - Can you advocate for me to get benefits, such as Social Security Income (SSI) or In-Home Supportive Services (IHSS)?
 - What do you know about the generic resources I will be required to access before I can receive Regional Center funding?
 - Can you also help manage workers? How?
 - How would you help me if I am unhappy with the job that one of my workers is doing?
 - How will you keep in touch with other members of my support team?
 - I have certain things that are really important to me (such as...) Are you willing to adapt your services to meet my specific needs and preferences?
 - Are you willing to negotiate a price based on my specific needs?
 - Given what you know about what I need, how much would you charge?
 - When are you available to start?



WHAT TO CONSIDER WHEN HIRING A PCP, IF, OR ANY SERVICE PROVIDER (CONTINUED)

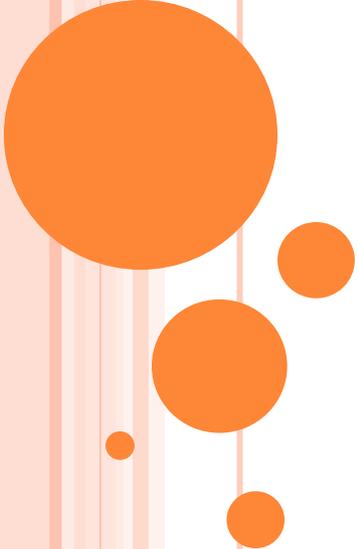
- You will want to think about what is important *to* you (what makes you happy) and what is important *for* you (what keeps you healthy and safe) and find a balance between them when selecting a PCP, IF, and any other service provider!
 - Do you need someone who speaks your language and/or understands your specific cultural background?
 - Do you need it to be someone you trust, like someone recommended to you by a family member, friend, or someone else?
 - Is it important to you that the person not speak for you, or that they are not using their phone while they are with you?





SelfDetermination@sclarc.org
SCLARC's Case Management Help Line: 1-833-725-2721
cmhelp@sclarc.org
Available in English and Spanish





**PERSON-CENTERED
PLANNER/INDEPENDENT
FACILITATOR “MEET AND GREET”
May 24th, 2021**

EMPOWER PERSON CENTERED PLANNING

- Contact: Sandra McElwee – Chief Dream Facilitator or Jan Opsvig
 - EmpowerPCP@gmail.com
 - Jan.EmpowerPCP@gmail.com
 - 951-231-7648



NEURONAV

- Contact: Kimberly Schreiber
 - Info@neuronav.org
 - 703-629-2844



DIANE BERNSTEIN

- Contact: Diane Bernstein (English)
 - desianer@gmail.com



PERSON CENTERED PROJECTS

- Contact: Tami Pauly
- tamra@personcenteredprojects.com
 - 424-248-5608
- <https://www.personcenteredprojects.com>



UNDERSTANDING NEEDED INTEGRATION

- Contact: DeLawrence Grant
 - Office: 424-292-3726
 - Fax: 424-292-3727
 - Cell: 310-906-6532
- DG@unisupportservices.com



DANIELLE ALVARADO

- Contact: Danielle Alvarado
 - det4kds@aol.com
- <https://www.daniellealvarado.org>
 - 562-805-7820



LINDA ANDRON, LCSW

- Contact: Linda Andron,
LCSW Linda@AndronLCSW.com
- 310-963-2779
- <https://www.facebook.com/lindaandronostrowlcsw>



MELISSA ARDON

- melissalifeProtection@gmail.com
 - MelissaArdon.com
 - Melissa is a bilingual Independent Facilitator working with at least three different regional centers. She's been successful in discovering how to allocate money and the best use for a participants budget and needs.
- She has a background in elementary school teaching, finances, and is a health coach. She can get a plan completed sooner rather than later.
 - <https://youtu.be/Qbme22KDrNc>



SOS PARALEGAL, LLC

- Maria Ruiz, Merroth
- Phone: (949) 326-6612
 - Fax: (949) 418-9144
- Maria@sosparalegal.com
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HOME GUARDIAN ANGELS

- Contact: Marc Adderly
- Marc@homeguardianangels.com
 - 323.300.5308



468IF, LLC

- Contact: Earl Gage, Jr.
 - 805-390-3207
 - earl@468IF.com
 - www.468IF.com



JJA IMPACT SOLUTIONS

- Contact: Shelia Jordan-Jones
- Jja.impactolutions@gmail.com



MOVING CLOSER TOGETHER

- Contact: Joe Martinez
 - 747-224-1185
- joe@movingcloser.together.com
- www.movingcloser.together.com



IDEAL PROGRAM SERVICES

- Contact: Lara Okunubi or Karla Melgar
 - lokunubi@idealprogramsservices.org
 - kmelgar@idealprogramsservices.org
 - 310-701-8704



ALLISON CAMERON GRAY

- independentallison@gmail.com
- www.allisoncamerongray.com/if
 - 818-577-5367



DESIGNATED EXCEPTIONAL SERVICES FOR INDEPENDENCE (DESI)

- Contact: Liz Jinzo
 - liz@desiserve.org
- <https://www.desiserve.org>
 - 323-303-4292



VERONICA MOSER

○ msromosr@yahoo.com



CARLA LEHMANN

- CarlaLehmann@Gmail.com



COMMUNITY OUTREACH SUPPORT DEVELOPMENT

- Contact: Cheryl Johnson
- Johnsoncenter@msn.com
 - 213-804-3182



THANK
YOU!

SelfDetermination@sclarc.org

Naomi Hagel: NaomiH@sclarc.org/323-998-9519

SCLARC's Case Management Help Line: 1-833-725-2721

cmhelp@sclarc.org

