



Master Plan for Developmental Services Workgroup 1 Meeting #7 -

Summary

Tuesday, January 28, 2025

12:00 p.m. - 3:00 p.m.

Virtual Zoom Meeting

Attendance

Workgroup Members in Attendance

- **Ana Seda**
- **Araceli Garcia**
- **Chloe Carrier**
- **Derek Hearhtower**
- **Eric Ramirez**
- **Dr. Jesse Weller**
- **Judy Mark**
- **Kiara Hedglin**
- **Season Goodpasture**
- **Suzy Requarth**

Facilitators and Workgroup Co-Chairs in Attendance

- **Lisa Cooley (Co-Chair)**
- **Fernando Gomez (Co-Chair)**
- **Karin Bloomer (Facilitator)**

Public in Attendance

Over 150 public attendees attended the meeting via Zoom video conference.

Welcome and Housekeeping

Workgroup 1 Facilitator Karin Bloomer and Co-Chairs Lisa Cooley and Fernando Gomez welcomed the workgroup members and members of the public to the meeting. They thanked everyone for their willingness to participate and engage in this work. They encouraged members of the workgroup and the public to

participate. They also reviewed the meeting participation agreements to make sure the meeting would be respectful and productive.

Timeline and Process for Creating Ideas and Recommendations (Slides 6-7)

Fernando and Karin reviewed the meeting agenda, workgroup process and timeline, and priorities.

Workgroup 1 Focus and Status of Small Group Work (Slides 8-11)

Lisa, Fernando, and Karin explained that Workgroup 1 has been tasked with creating recommendations related to the following topics:

1. Service coordination conflict of interest
2. Self-Determination Program
3. Increased self-determination in the traditional system
 - a. Strengthening Consumer Advisory Committees and updating Bill of Rights
 - b. Creating more flexibility and creativity to customize services (with WG 5)
 - c. Giving clients direct access to decision makers (with WG 3)
 - d. Giving clients choice of vendors and services
4. Regional center board accountability
5. Trusted referrals and peer mentoring and peer support

This workgroup meeting focused specifically on the service coordination conflict of interest, Self-Determination Program, and regional center board accountability. Recommendations related to the other topics listed are being discussed in small groups with Workgroup 1 members and members of other workgroups.

Self-Determination Program Draft Recommendations (Slides 12-21)

The workgroup reviewed draft recommendations related to the Self-Determination Program. Before discussing each recommendation, workgroup members noted that:

- The SDP is not currently in a place where it can be the core of the system. Improvements are needed before making it the foundation for receiving services
- The traditional system is focused on compliance rather than being person-centered. There is a need to shift towards a person-centered approach to incorporate self-determination elements
- The traditional system does not allow for as much choice and control as SDP
- Person-centered and self-determined are not interchangeable. They are different concepts, and both need to be in place for delivering services effectively

Suggestions that workgroup members gave to refine the recommendations included:

- Statewide agencies should commit to person-centeredness
- The overall recommendation listed on slide 13 should be reworded to state “Make the Self-Determination Program (SDP) the core of the developmental services system while ensuring that individuals remaining in the traditional system have greater opportunities for choice and control over their services and supports.”
- Recommendation 1: Break down barriers to participation and make the program more consistent.
 - Part C should be changed to clearly identify regional center responsibilities when reviewing spending plans, but not limit them to just two aspects
 - Part E should name all elements of state and federal labor requirements
- Recommendation 2:
 - The principles of self-determination should be the core of the system
 - Clients should be given the authority to hold everyone accountable to these principles
 - This includes giving clients informed choice about options, quality of options, waitlists, etc.
 - The focus should be on monitoring changes and evaluating whether goals are being met
- Workgroup members did not have any comments regarding Recommendation 3
- Recommendation 4:
 - SDP should be offered immediately upon intake and continuously in an unbiased way
 - DDS should have consistent processes across all regional centers and provide oversight to ensure standards are met, including performance measures recommended by Workgroup 4 on slide 14

Service Coordination Conflict of Interest Draft Recommendations (Slides 22-27)

The workgroup reviewed draft recommendations related to the service coordination conflict of interest. Before discussing each recommendation, workgroup members noted that:

- There are significant conflicts of interest between service coordinators (SCs) and the clients they are supposed to support, resulting in distrust and lack of transparency
- SCs often act as both supporters and gatekeepers, making decisions that can negatively impact the clients they should be advocating for

- Clients report experiences of SCs withholding services, delaying responses, and using information shared by clients against them

Suggestions that workgroup members gave to refine and expand the recommendations included:

- Separating service coordination and decision-making roles to make sure support for clients is unbiased. This means delivering services equally and without prejudice. This would involve creating distinct roles for SCs focused solely on advocacy and another set of professionals responsible for decision-making and resource allocation
 - Workgroup members noted that this may reduce the flexibility that regional centers currently have in making exceptions and acting quickly in emergency situations
 - There should be a system that retains that flexibility and still takes the service coordinator role out of regional centers
- Creating a union or collective bargaining organization for independent contractors and outside service coordinators who are not regional center staff. A collective bargaining organization is a labor union that represents employees in negotiations with an employer
- Creating an official definition of “Low Purchase of Service (POS)”
- Engaging independent facilitators or outside agencies to handle service coordination and advocacy. Independent facilitators would not have conflicts of interest and could provide impartial support to clients, ensuring their needs are met without bias
- Implementing strict policies against retaliation and ensuring that all actions and decisions within the system are transparent and accountable. Retaliation is when an SC makes a decision that punishes a client who makes a complaint.
 - Providing a checkbox online that indicates whether a service coordinator should act on information shared with them or if they should ask the client for permission first
 - Providing SCs with comprehensive training emphasizing the importance of client-centered advocacy over bureaucratic processes, such as administrative tasks not related to services
- Implementing regular assessments of SC performance, mandatory ongoing education on best practices in advocacy, and clear accountability measures for failures or misconduct
- Hiring a Chief Equity Officer at each regional center

Regional Center Board Accountability Discussion (Slides 29-33)

Workgroup members discussed ideas for developing a recommendation to improve regional center board accountability. Workgroup members identified current challenges with this lack of accountability such as:

- A lack of comprehensive training for board members, leading to misunderstandings about their roles and responsibilities
- Executive staff involvement in board member selection, compromising board independence. This might mean an executive director selecting a board member based on factors important to the executive director and possibly not the regional center
- A fear of retaliation among board members when challenging decisions or policies
- The difficulty for community members to run for board positions due to high nomination barriers. Currently, a nominating committee will present a group of candidates for the board. It is very hard to vote against that group or run independently
- Boards often act as rubber stamps. This means they may approve things without careful consideration. It means failing to ask critical questions, particularly regarding large contracts
- Insufficient transparency and accountability in the evaluation of executive directors. This means the outcome of an evaluation is not shared and no one makes sure the executive director fixes any problems with their performance
- Inconsistent facilitation and support for board member participation across different regional centers. This means board members participate differently with no standard processes
- Regional center boards' alignment with external trade association policies that limit their autonomy. This means they may make decisions that favor outside organizations
- The lack of grievance or complaint procedures and support systems for board members facing retaliation from the regional center staff
- The need for independent supporters for board members to ensure unbiased facilitation

Judy Mark posted a list of 12 recommendations in the Zoom chat during the meeting. They have also been posted to the Workgroup 1 SharePoint file. Workgroup members reacted to some of those and had other ideas as well. Ideas that workgroup members had about recommendations related to regional center board accountability included:

- Amending statutes to:
 - Require two board seats to be filled by individuals appointed by the Governor with input from the Department of Developmental Services (DDS).
 - Restrict regional center executive staff from involvement in selecting board members.

- Enhancing statutory language to protect board members from retaliation
- Supporting board members with:
 - Increased facilitation services to improve consumer participation on boards
 - Enhanced training curriculum and opportunities for board members
 - Independent supporters not picked by the regional center
- Changing the terms for board members to six years with a mandatory five-year break before returning
- Establishing a grievance procedure and a phone number at DDS for reporting questions or retaliation
- Providing guidelines for evaluating executive directors
- Ensuring regional center boards are not accountable to an outside trade association
- Requiring timestamps and explanations when board members access an individual's files
- Including a history of complaints against vendors when renewing contracts
- Allowing more time for board members to discuss concerns with each other

Next Steps and Upcoming Workgroup and Committee Meetings (Slides 34-35)

Karin reviewed the next steps and asked workgroup members to reconvene in small groups to discuss the remaining recommendation topic areas.

Public Comment (Slide 36)

At the end of the meeting, the workgroup co-chairs and facilitator supported a 45-minute public comment period. A summary of public comments is included in the Public Comment summary document which is available with other meeting documents here: <https://www.chhs.ca.gov/home/mpds-committee-workgroup/#january-28-2025-%e2%80%931200-to-300-pm>.

Meeting Materials:

Discussion PowerPoint and other meeting documents:

<https://www.chhs.ca.gov/home/mpds-committee-workgroup/#january-28-2025-%e2%80%931200-to-300-pm>