

# **SDICDSI Board and Committee Meetings**

**Tuesday, February 11, 2025**

**10:00 – 11:00**

**Personnel Committee – *Will not meet this month***

**Legislation Committee – *Will not meet this month***

**11:00 – 11:45**

**Finance Committee – 9449 Balboa Ave, Suite 300**

**Client Advisory Committee – Ruffin Rd, Suite 300**

**11:45**

**Lunch – Boardroom**

**12:00 – 1:30**

**Board Meeting – Boardroom**



San Diego Regional Center  
4355 Ruffin Road, San Diego, CA 92123  
858-576-2996 / [www.sdr.org](http://www.sdr.org)

Serving individuals with developmental disabilities in San Diego and Imperial Counties

**MEETING NOTICE**  
**Board of Directors Meeting**  
San Diego Regional Center Board Room and by Zoom Webinar  
Tuesday, February 11, 2025

**12:00 p.m.**

- |     |  |                |
|-----|--|----------------|
| 1.  | Call to Order/Announcements  | David Hadacek  |
| 2.  | Presentation on Board Governance   | Mark Klaus     |
| 3.  | Public Input   |                |
| 4.  | Approval of the Minutes<br>– January 21, 2025, Board Meeting (Action Item)<br>– January 21, 2025, Annual Meeting (Action Item) | David Hadacek  |
| 5.  | Chair’s Report   | David Hadacek  |
| 6.  | Executive Director’s Report<br>– Employees of Distinction (Information)  | Mark Klaus     |
| 7.  | Finance Committee Report<br>– Contracts for Approval (Action Item)   | Matthew Storey |
| 8.  | Association of Regional Center Agencies (ARCA) Update  | Terri Colachis |
| 9.  | Vendor Advisory Committee Report   | Wendy Forkas   |
| 10. | Client Advisory Committee Report   | Erik Rascon    |
| 11. | Mission Moments  |                |
| 12. | Adjourn  |                |

The next meeting of the Board of Directors will be held on  
Tuesday, March 11, 2025, at 12:00 p.m.

*Our mission is to serve and empower persons with developmental disabilities  
and their families to achieve their goals with community partners.*

### Components of an Ideal Board Meeting

	Everyone stays engaged for the entirety of the meeting.
	Includes an interesting and understandable education presentation.
	Open and honest communication.
	People ask clarifying questions.
	Tough topics are addressed.
	An in-depth Executive Director's report is given.
	There are discussions about how to benefit the lives of clients.
	Large attendance by board members.
	People leave the meeting with enthusiasm and empowerment, feeling like they made a difference.
	There is a good sound system, and people understand each other.



**BOARD OF DIRECTORS MEETING**  
**January 21, 2025**  
**Minutes**

**DIRECTORS PRESENT:** Virginia Bayer, Tessie Bradshaw, Elmo Dill, James Gonzalez, David Hadacek, Chris Hodge, Shirley Nakawatase, Laura Oakes, Norma Ramos, Julie Randolph, Erik Rascon, Timothy Riemann, Kimberly Rucker, Matthew Storey, Mark Uyeda, and Angela Yates

**DIRECTORS ABSENT:** Terri Colachis and Wendy Forkas

**STAFF PRESENT:** Jesus Atondo, Lorelee Bada, Alma Barkle, Alexis Bermudes, Robin Bello, Rhiza Daileg, Lourdes Delatorre, Nancy Eakin, Sarah Franco, Erika Gil, Joab Gonzalez, Jose Gonzalez, Celeste Graham, Zachary Guzik, Rebecca Hamada, Maria Hanks, Rachel Hefler, Andrea Hogan, Saralynn Keenan, Andrea-Lisa King, Mark Klaus, Miguel Larios, Alexis Leyva, Christine Lux-Whiting, Emilia Martinez, Clorinda Merino, Dulce Morin, Seth Mader, Gabriella Ohmstede, Erik Peterson, Viri Salgado, Jennifer Sanchez, Bonnie Sebright, Sitara Sethi, Johanna Stafford, Kimberly Steitz, David Webb-Rex, Yesenia Vargas, and Brandon Zuniga

**GUESTS PRESENT:** Kirk Conrad Delacruz, David Cuevas, Karie Johnson, Janet Latz, Michael Latz, Yasuko Mason, Edwin Pineda, Nathan Schmid, Joan Walker Scott, Gary Walker, Bruce Wexler, Becky Williams, Cali Williams, Tony Williams

1. **Call to Order**  
David Hadacek, Chair, Board of Directors, welcomed everyone in attendance and called the meeting to order at 11:01 a.m.
2. **Public Input**  
There was no public input.
3. **Approval of Minutes**  
Mr. Hadacek referred the Directors to the draft minutes of the November 12, 2024, Board of Directors meeting and asked for approval.  
  
**MOTION: (Gonzalez abstained) M/S/C that the Minutes of the November 12, 2024, Board of Directors meeting are approved as submitted.**
4. **Chair's Report**  
Mr. Hadacek reminded the Board to submit their responses for this year's Board retreat planning. The suggested dates are April 26-27 or June 21-22. He requested that all Board Directors indicate their preferred dates by the end of the week.
5. **Executive Director's Report**  
Mark Klaus reported that by the end of December 2024, the total SDRC caseload had grown to 44,620, an increase of 1,700 since the beginning of the fiscal year on July 1, 2024.



Mr. Klaus directed the Board's attention to a chart in their meeting materials illustrating SDRC's caseload and staff growth. Between June 30, 2021 and December 31, 2024, SDRC added more than 300 staff members.

SDRC, in partnership with the Developmental Disability Provider Network (DDPN), will host the Imperial Valley *Leading the Charge* event on February 5, 2025, at Imperial Valley College. Registration is full, with 300 attendees signed up.

The Governor's January budget proposal includes no cuts to the developmental services system. Statewide caseload growth is projected at 8.5%, with the total caseload expected to reach 500,000 individuals. The total budget is anticipated to increase by 20.2% to \$19 billion, reflecting a \$3.2 billion increase.

6. **Nominating and Bylaws Committee Report**

Virginia Bayer reported that the Nominating and Bylaws Committee recommended that the Board of Directors reelect the following Directors: Tessie Bradshaw, Elmo Dill, Laura Oakes, Matthew Storey, and Mark Uyeda. If reelected, each term will be for three years, from February 1, 2025, to January 31, 2028.

**MOTION: M/S/C to reelect Tessie Bradshaw, Elmo Dill, Laura Oakes, Matthew Storey, and Mark Uyeda.**

The Nominating and Bylaws Committee recommended that the Board of Directors elect Pamela Ehlers, Yasuko Mason, Taylor Wiesner, and Cali Williams, as new Directors on the Board. If elected, each term would be for one year, from February 1, 2025, to January 31, 2026.

**MOTION: M/S/C to elect Pamela Ehlers, Yasuko Mason, Taylor Wiesner, and Cali Williams to serve one-year terms commencing February 1, 2025, and ending January 31, 2026, as Directors on the SDICDSI Board.**

The Nominating and Bylaws Committee recommended the following slate for Corporate Officers for terms beginning February 1, 2025, and ending on January 31, 2026. All Board Directors on the slate have agreed to serve if elected. No nominations from the floor for corporate officers were put forward.

For Chair of the Board of Directors	David Hadacek
For Vice-Chair	Tessie Bradshaw
For Secretary	Virginia Bayer
For Treasurer	Matthew Storey
For ARCA Representative	Terri Colachis
For Immediate Past Chair	Norma Ramos
For Member at Large	Chris Hodge

**MOTION: M/S/C to elect the following Directors to serve as officers of the Corporation from February 1, 2025, through January 31, 2026: David Hadacek, Chair; Tessie Bradshaw, Vice-Chair; Virginia Bayer, Secretary; Matthew Storey, Treasurer; Terri Colachis, ARCA Representative; Norma Ramos, Immediate Past Chair; and, Chris Hodge, Member at Large.**

Ms. Bayer announced that the Vendor Advisory Committee reelected Wendy Forkas to serve a one-year term as the Service Provider representative on the Board of Directors beginning February 1, 2025, through January 31, 2026.

7. **Mission Moments**

Shirley Nakawatase reflected on her 14 years of service on the Board of Directors, sharing her positive experience. She expressed gratitude for the opportunity to serve and make a difference in the lives of individuals with developmental disabilities.

Angela Yates thanked everyone serving on the Board of Directors, stating it is a great community.

Timothy Riemann noted that he had served on the Board for seven years and expressed confidence that the Client Advisory Committee would continue its valuable work.

Erik Rascon expressed his enthusiasm for continuing his role as Chair of the Client Advisory Committee in 2025.

James Gonzalez shared that the University of Riverside has volunteered to assist with the Autism Support of Imperial County's mobile diagnostic screening unit.

Elmo Dill thanked the Board for the opportunity to represent the SDRC at the Capitol Tree Lighting ceremony, where he met Governor Newsom. He also expressed concern for those affected by the recent wildfires in Los Angeles.

16. **Adjournment/Next Meeting**

There being no other business, the meeting adjourned at 11:34 a.m. The next meeting of the Board of Directors is scheduled for Tuesday, February 11, 2025, at 12:00 p.m.



## MEMORANDUM

**DATE:** February 4, 2025  
**TO:** Board of Directors  
**FROM:** Mark Klaus, Executive Director  
**RE:** Executive Director's Report

### **San Diego Regional Center Clients Served:**

During January, 819 cases were opened through intake at the San Diego Regional Center (SDRC). There were 531 (65%) cases opened in the Early Start Program for infants and toddlers younger than three years of age. During the month, 106 cases were reactivated, 114 cases were inactivated, and 559 cases were closed. At the end of January, the total regional center caseload was 44,872. This is an increase of 1,943 from July 1, 2024. I have attached a chart that shows SDRC's caseload growth as an FYI.

### **San Diego Regional Center Staff:**

Attached, please find a chart detailing SDRC staffing numbers from June 30, 2021 through January 31, 2025.

### **Employees of Distinction:**

Carlos Chee, Client Services Unit 20, is being recognized for his tremendous efforts for several months in assisting a family with overcoming significant barriers to accessing services and supports, both those provided by SDRC and external supports. He collaborated with the client services team from another regional center, DDS, San Diego County staff, SDRC's vendors, and other charitable organizations. Carlos demonstrated incredible poise and professionalism while navigating some difficult, nuanced, and often tense interactions with this family. Carlos exemplifies SDRC's values in action.

Melissa Dimdiman, IT/SANDIS is being recognized for her exceptional efforts to SDRC and the other 20 regional centers. Over the last few months the SANDIS team has been programming and developing several software programs driven by the legislative requirements of SB 138. Melissa has been essential in keeping the SANDIS team and the development team organized with User Acceptance Testing (UAT). Not only does she participate in UAT where the SANDIS team identifies glitches/issues, but she is solely responsible for compiling the entire team's findings, keeping track of resolved issues and remaining issues, and keeping the team on track with tight testing deadlines. She proactively takes steps to ensure the team meets testing timeframes and that the quality of testing results is held to a high standard even during constrained development timelines. Melissa is being recognized for her keen organizational skills and her willingness to go above and beyond during these challenging and high-pressure times

Ana Mercado, Service Coordinator Unit 1, is being recognized for her participation on the Supported Decision-Making Task Force, presenting at the SDRC Family Vendor Resource Fair, and as being the first SDRC team member to successfully implement a formal supported decision-making agreement to reverse a conservatorship. Ana has worked with the team over the last several months to establish a trusted team around the individual and using the ACLU template and the planning team input to develop a concrete supported decision-making plan.

The judge and Guardian Ad Litem were impressed and provided feedback that the report was comprehensive and suggested SDRC use this template for all future agreements. Based on the information, the judge removed the conservatorship. The individual signed for himself and reported, "I feel like a free man." This epitomizes the work we do at SDRC to empower and support individuals using the least restrictive means.

**Executive Team Reports:**

Attached, you will find Program Summary reports from SDRC's Executive Leadership Team Members. I am hopeful that you find these reports informative.

**SDRC American Rescue Plan Act Evaluation Report:**

In response to the significant impact the COVID-19 pandemic had on the special needs system of care, Section 2014(a) of the American Rescue Plan Act (ARPA) of 2021 provided supplemental grant funds for early intervention services for infants and toddlers under Part C of the Individuals with Disabilities Education Act. The California Department of Developmental Services (DDS) – the entity that implements Part C through the regional center service delivery system – received one-time funding for Early Start. DDS contracted with regional centers throughout California to implement pilot projects to strengthen the early intervention service system. The goal of SDRC's pilot project was to increase awareness of, and enrollment in Early Start services in Imperial and San Diego counties, particularly among families experiencing homelessness and those hesitant to access Early Start services due to concerns about their immigration status.

Attached, please find the final report of SDRC's pilot project to explore how the program was implemented, its impact, as well as key lessons learned. Findings were informed by data collected between June 2022, and November 2024, including program progress and evaluation reports, surveys and testimonials, and interviews with regional center staff. The final evaluation report is attached for your perusal.

**Imperial County Leading the Charge 2025:**

SDRC in partnership with our community partners and the Developmental Disability Provider Network (DDPN) will be hosting the Imperial Valley Leading the Charge 2025 event tomorrow at Imperial Valley College, 380 East Aten Road Imperial, CA. The event "sold out" several weeks ago with 300 parents, self-advocates, educators, service providers and community partners registered to attend.

**ARCA Standards and Practices Committee:**

The committee members work on the ARCA Standard – Legislative Activity was approved by the ARCA Board at their meeting on January 17, 2025. The standard is attached.

**Senate Bill 138:**

At SDRC's Annual meeting held on January 21, 2025, DDS Director Cervinka mentioned Senate Bill (SB)138 (Chapter 192, Statutes 2023). This bill covers several key topics we are actively working on to ensure compliance. Attached is a comprehensive update from DDS outlining the initiatives included in SB 138.

**Assembly Bill 1147:**

Assembly Bill (AB) 1147, The Disability Equity, Transparency and Accountability Act of 2024) has a number of items that will impact SDRC and the Regional Center system. Below are a few items to note:

Effective January 1, 2025:

1. Amends the Lanterman Act Section 4626.5 (g): "Prohibit a regional center employee from accepting a gift or gifts from a service provider, consumer, or consumer's family member valued over fifteen dollars (\$15) per year."

2. Requires that "a policy prohibiting regional center senior staff from hiring relatives at the center or any ancillary foundation and organization. The policy shall be included in the regional center contract and shall be included in training of the governing board."

Effective January 1, 2026:

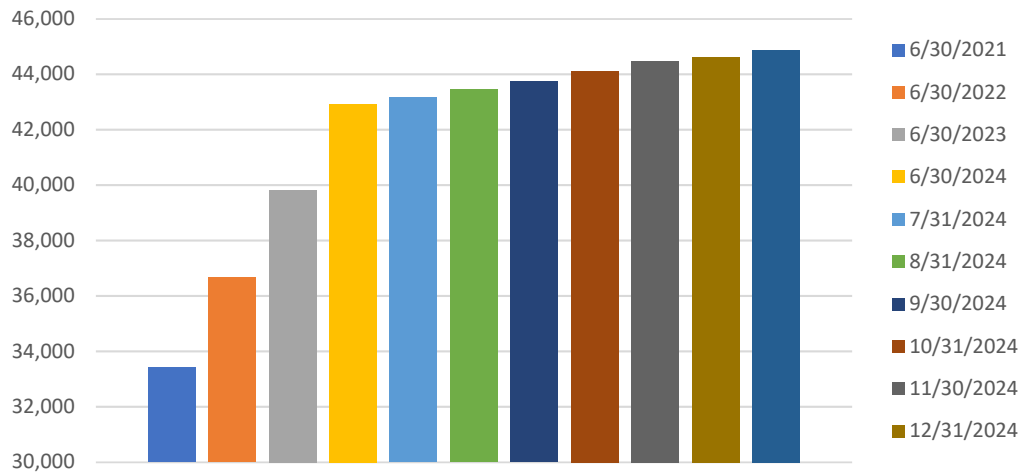
1. Adds Section 4639.76 to the Welfare and Institutions Code, to read "Regional Center with which the department maintains a contract pursuant to Section 4629 shall be subject to the California Public Records Act."

If you have any questions regarding my report or anything else included in the Board Packet, please do not hesitate to contact me at your convenience.

Thank you for your time, your commitment, and for all you do for SDRC.

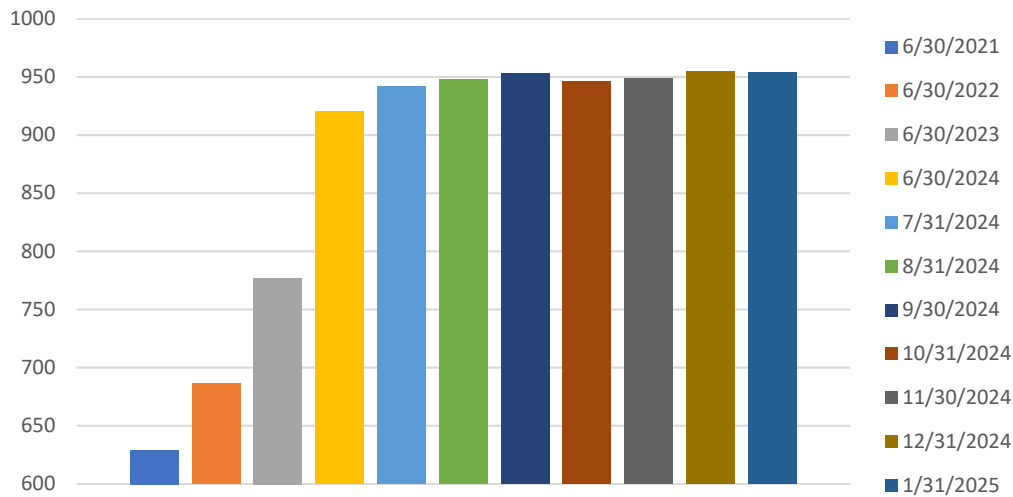
Mark

### SDRC Clients



6/30/2021	33,412
6/30/2022	36,671
6/30/2023	39,830
6/30/2024	42,929
7/31/2024	43,157
8/31/2024	43,453
9/30/2024	43,743
10/31/2024	44,124
11/30/2024	44,473
12/31/2024	44,620
1/31/2025	44,872

### SDRC Staff



6/30/2021	629
6/30/2022	686
6/30/2023	777
6/30/2024	920
7/31/2024	942
8/31/2024	948
9/30/2024	953

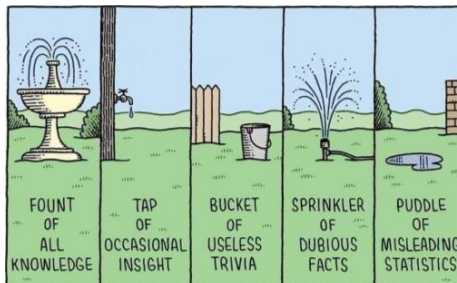
10/31/2024	946
11/30/2024	949
12/31/2024	955
1/31/2025	954

# The BULLETIN

Monthly news from Client Services

## February 2025

January was a tough year, but we made it.



Anyone want to meet up and just scream? We could get food after.

### General Updates – Gabby Ohmstede & Kim Steitz

- **Staffing Updates:**
  - AD updates:
    - Rebecca Hamada has assumed the role of AD over Children/TAY in partnership with Kathy Cattell
  - PM Updates:
    - PM interviews are being finalized the first week of February
  - We continue to work on filling approximately 50 openings for Service Coordinators in Client Services (combo of vacant caseloads and growth positions) – specialized positions are available in a variety of areas as well. Your manager has access to the staff tracking spreadsheet in google and can share with you where the openings are if you are interested in considering a transfer.
  - Updated Client Services [Org Chart](#)
- **New Email Retention [Policy](#)** will go into effect February 1, 2025 – please review this very important information
- **Leading The Charge** Conference in Imperial Valley will be held on 2/5/25
- **The Santee office is moving to La Mesa!** Moving dates and details are being finalized and initial information will be shared with staff the first week of February.
- Keep your eye out for email from **SANDIS/IT** with continuing updates about the new IPP/IPA, Foundational Data fields, Citrix, Office 365, and more! It's a busy time and they are pushing out new features and updates weekly!
  - And remember to stay on top of laptop updates!
- **DDS Directives!**
  - [1/14/25](#): Update to Timely Access to an Individual's Records
  - [1/17/25](#): Guides for Families to Prepare for IPP Meetings



## Residential – Zach Guzik

Happy New Year! As the Residential Team closes out the first month of the New Year, there are several changes that we would like to share with the team:

- New Leadership
  - Units 10 and 48 now have new (to their role) Program Managers supporting their teams. Our CPP team in Unit 10 is now lead by Savanna Beecroft, while Unit 48 welcomed Sarah Uchino as their new manager.
  - Zach Guzik is the new Assistant Director of Residential Services.
- Planning for the Future
  - Now that our management positions have been filled, the Residential Team is looking forward to increasing our collaboration across all regions and specialties within SDRC.
  - Planning commenced on 1/30 for the next Residential “all staff” meeting.
  - Our Program Managers have begun meeting regularly with our Community Services team to ensure that our teams are better equipped to meet the ever-growing needs of the clients served in our residential facilities.
  - 2025 will be the “Year of Accountability” for our team, and we look forward to partnering with our colleagues from across the agency to ensure that the clients’ needs are being met in collaboration with our community partners.
- Rate Reform
  - As with all services at SDRC, rate reform is coming to our Residential services as well. More information will be shared as it becomes available, but keep an eye out for updates from our team, along with community services, for what this looks like in our facilities.
  - There are trainings available on DDS’s website for providers and regional center staff that discuss the upcoming reforms in more detail. Please feel free to peruse at your leisure 😊.
  - [D-2024 Rate Reform-011 Rate Reform Implementation for Residential Services Residential Services Directive 12-20-24 Directive](#)
    - Enclosure A [Enclosure A Link](#)
    - Enclosure B [Enclosure B Link](#)
    - Residential Specific DDS Training Link [Residential Rate Reform Training 12-20-24](#)
      - Slideshow [Residential Rate Reform ppt](#)

## Adult Services – Brandon Zuniga & Alexis Bermudes

- Adult In-Home Training Series for Service Coordinators:
  - Monthly Training Series continues the 4<sup>th</sup> Thursday of every month – Facilitated by Adult in Home Program Manager’s and Service Coordinators
  - January 2025: Assistant Director of Special Projects, Robin Bello presented training to service coordinators on Rental Assistance (W&I Code 4689i) & updated qualifying criteria related to AB 3291- "Risk of Homelessness".

- Please join us **2/27/25** for training topic: Title 19 (T-19) documentation
- New Workgroups commenced this month:
  - **Housing Resources:** Program Manager, Frances Medina (AIH) and Camille Tewalt (AIH), alongside Service Coordinators, Francis Almario (AIH), Anna Balistrieri (AIH), Lauren Sugui (AIH), Daniela Diaz (AIH), Jocelyn Carmona (AIH), Victoria Cazares (AIH), Lizzette De Anda (AIH) are working together to create a shared space of housing supports and resources. They are also collaborating with Community Services Housing Coordinator, Lourdes Delatorre to support in rolling out upcoming affordable housing opportunities for clients and the community.
  - **Aging Services and Resources:** Program Manager Karelly Mendez (U46, AIH) and Service Coordinators Brianna Eskridge (U46, AIH) and Ysabel Yumol (U3, AIH) are working together to assess the needs of the aging population, identify barriers, and explore available resources. In collaboration with Clinical Services, this team aims to enhance the understanding of this population's needs and ensure access to appropriate support for both clients and their caregivers. Additionally, they will assist in follow-up efforts related to caregiver succession planning, in accordance with AB 3291.
- Employment
  - With Senate Bill 639 in effect as of 1/1/25, SDRC clients have transitioned out of work programs offering less than minimum wage.
    - Almost all clients who were making less than minimum wage continue to be meaningfully and actively engaged in the community. Clients have transitioned to day programs, tailored day programs, supported employment (independent placement) programs, or are now making minimum wage for the work they've been doing
- Coordinated Career Pathways (CCP) continues to grow at SDRC with 26 clients participating in the program. For more information:
  - [SDRC / Coordinated Career Pathways \(CCP\)](#)
  - [Coordinated Career Pathways \(CCP\) | LEAP at San Diego Regional Center](#)
- Forensic Assessment Support & Treatment Team (FAST Team)
  - 1/28/25: presentation on SB-43 and expansion of grave disability
  - 2/25/25: Next meeting, presenter TBD
  - Upcoming PERT Academy 3/10/25-3/13/25: Brandon Zuniga and Andree Vandermerwe will have the opportunity to discuss developmental disabilities with incoming cohorts of PERT and Law Enforcement officers

### **Children & Transition Aged Youth (TAY) – Kathy Cattell & Rebecca Hamada**

- Congratulations to Rebecca Hamada on her promotion to Assistant Director of Children and Transition Age Youth!!!
- A shout out to Ashlee Barnes for her discovery of the Harvey Family Foundation, a local organization supports the youth of Southeast San Diego. Unit 30 donated over 15 gifts to

the Foundation's Toy Drive this past holiday season as reported in the January 2025 SDRC Report.

- Children/TAY Community Activities:
  - 1/19/2025: Ashlee Barnes, Unit 30 Service Coordinator Volunteered @ the MLK Harmony Health @ Waterfront Park
  - 1/22/2025: Tamara Crittenden, Unit 23 Program Manager, Presented to School Psychologists and Director of Special Education for Lakeside School District
  - 1/27/2025: Rebecca Hamada and Kathy Cattell Assistant Directors Children and Transition Age Youth met with Ed Baisley Grossmont Union High School District, Special Education Director for a Collaborative meeting
  - 1/28/2025: Children/TAY Leadership met with Robin Bello, Assistant Director to Discuss Rate Reform
  - 1/29/2025: Bill Lacey, Unit 38 Program Manager and Jessica Macknick, Unit 18 Program Manager Presented @ Abraxas School "Life After Transition"
  - 1/31/2025-2/1/2025: Rhonda Wilson, Unit 44 Service Coordinator, Spring Forward Bilingual Conference-Diocese of San Diego

### **Early Childhood (ECH) Services – Sarah Franco & Andrea-Lisa King**

- Sarah Franco and Maria Hanks met with North LA Regional Center to share about our file share system and school district portals to assist with their school district notifications.
- ECH teams have started to gather required Foundational Data that SCs will obtain at the point of the Initial IFSPs.
- ECH ADs met with Dr. Casper and Dr. Vedder to discuss barriers, trends, and solutions with psych evals and the eligibility process.
- ECH ADS met with Dr. Barea, Intake, Celeste, Clinical Services Director and G. Ohmstede, Client Services Directors, to discuss Psych Referrals and projected needs.
- Sarah Franco met with CalECSE for a parent video presentation
- Sarah Franco presented for CalECSE on how to create an Inter-Agency Agreement (IAA) and shared some of San Diego's best practices.
- ECH ADS met with Clinical Services to discuss floor time, POS guidelines, and Program Design
- We had our monthly Collaboration meeting with San Diego Unified School District.
- AD's met with the developers of Project Impact and Community Services to discuss ways to enhance PI referrals, and to discuss building a community of practice to ensure vendors have proper training to implement.
- AD's met with Robin Bello to discuss upcoming Rate reform
- ECH ADs and ECH staff attended office hours for SIPP – staff were able to ask questions specific to 3-5 yr olds.
- ECH ADS attended the Southern CA Early Start Managers Meetings along with DDS and ARCA.
- Sarah Franco attended a Healthy Development Services workgroup to discuss sustainability for the system.

## **Special Projects – Robin Bello**

### **Self Determination**

- As of February 1, 2025, SDRC has 800 individuals participating in the Self Determination Program!
- Kristin Jensen and Michelle Wright have joined the SDP team as SCs in Unit 51. Nayyirah Fardan has accepted an SC position in Unit 51, start date TBD when her position is back-filled.
- The SDP team continues to seek service coordinators to transfer to 3 growth positions in Units 47 and 51. We are recruiting for all age groups, with a particular need in North County. If you are interested or having questions, please contact David Webb-Rex or Alyssa Delagnes, and speak with your program manager.
- The SDP Participant Choice Specialist team will be sharing information about the SDP at multiple upcoming conferences in the Imperial Valley: Leading the Charge Imperial on Wednesday 2/5, Imperial Parent Conference on Saturday 2/22, and People First Imperial on Saturday 2/29!
- The SDP team is working on developing procedures and materials to pull back SDP POS timelines to allow adequate time for processing and onboarding. SDP POS's will need to be submitted by 30 days prior to the projected start date. Details to come!
- As information continues to be released on the Standardized IPP, the SDP team will be developing an updated SDP IPP guide for release on the wiki by April 2025.

### **Enhanced Service Coordination**

- Enhanced Services Coordination is accepting new referrals! We are in need of over 40 new cases and are looking forward to collaborate and support individuals on your caseload to learn about Enhanced Services Coordination. Have you ever thought "If only I had more time...?" We're here to support!
- Individual must meet criteria to refer to Enhanced Service Coordination unit.  
Criteria:
  - POS expenditure report less than \$2000 within 12-month period from the date of referral
  - 15 years or older
  - Residence Code #11 or #13
  - Ethnicity/ Race: Spanish/ Latin (or) Black/ African American
  - Agreement of active participation with increased case management frequency (SDRC ESC curriculum activities, monthly check-ins, quarterly meetings, annual IPP's and more)
- ESC referral resources
  - [ESC Case Referral Process](#)
  - [ESC New Referral Form](#): *This is the form to complete if we have a potential case you would like to refer or discuss.*
  - [Unit 37 SC Contact Info](#)
  - [ESC Training PPT](#)

- Let's meet to discuss cases! ESC office hours will be available the 2<sup>nd</sup> Wednesday of every month. Join us to discuss referrals or learn more about the ESC curriculum & success stories.
  - Join Zoom Meeting
  - <https://sdrc-org.zoom.us/j/86528077567>
  - Meeting ID: 865 2807 7567

## **Federal Programs (FP) /Special Incident Reporting (SIR) – Andi Hogan**

### **Federal Programs**

- The HCBS Audit will be in April 2025! The sample list has been received and Federal Programs will be contacting the Service Coordinators who have had cases selected for review.
  - See the [HCBS Audit How to Prepare](#) training for information regarding the audit process and record review requirements found in the [HCBS Waiver Record Review Rating Sheet](#).
- The Federal Programs and SIRs team will hold our **SIRs and Waiver Rager** via zoom on 2/13/25 and 2/27/25 from 9am – 11am. This is where you can bring all of your Med Waiver and SIRs questions and will be used as a virtual office hours space for any audit questions  
Join Zoom Meeting  
<https://sdrc-org.zoom.us/j/87442219870?pwd=cUzpWHTABeY03CWxzbrvRg4zhboCr4.1>  
Meeting ID: 874 4221 9870  
Passcode: J3SFCr
- Institutional Deeming Office Hours are the 2<sup>nd</sup> and 4<sup>th</sup> Wednesday of the month. You are welcome to pop in or make an [ID Office Hours Appointment](#) with Client Benefit Specialist Lexi Gomez for case consultation and general DDS Waiver questions.

### **SIRs**

- Our new SIR form for vendors and long-term health care providers is live! Please direct providers to this [Special Incident Report form](#) and to only use the [vendorsirs@sdrc.org](mailto:vendorsirs@sdrc.org) inbox for emailing SIRs. This is the ONLY email where vendors should submit SIRs – SIRs should NOT be sent to KMSG or SC personal emails.
- Please remember that SCs are responsible for entering SIRs into SANDIS when a faxed or emailed PDF SIR is received from a provider. We are required to enter SIRs within 48 hours. See the [SDRC SIR Flowchart](#) for helpful information regarding the SIR process
- The [SIRs Wiki Folder](#) is kept up to date. Please use this great resource for information on SIR follow-up, training, risk prevention resources, and narrative writing tips.
- Don't hesitate to reach out to the SIR team with questions at [sirs@sdrc.org](mailto:sirs@sdrc.org)

## **Diversity, Equity, Inclusion, and Accessibility (DEIA) – Jennifer Sanchez**

- The DEIA team in collaboration with SDSU and the Training Team have been able to support our Cultural Humility Trainings

- On January 16, 2025, the African American Support Group in partnership with Self Determined Futures met at the Joan Kroc Center and learned about Coordinated Family Supports from RC Nicole Goetz. We had a total of 15 attendees
- On January 19, 2025, Ashlee Barnes, Brenda, and Yliana Escamilla attended the San Diego MLK Festival
- On January 21, 2025 Sonia attended the Viejas Elder Health and Wellness Fair
- Multiple SCs will be attending the San Diego Tet Festival this weekend from January 31<sup>st</sup> to February 2<sup>nd</sup>
- Multiple SCs and RCs will be attending the 2025 Spring Forward Bilingual Conference from January 31<sup>st</sup> to February 1<sup>st</sup>
- Sonia visited San Diego Rescue Mission on January 14 and Father Joe's on January 15. She will be visiting Father Joe's again on January 29 and Birthline of San Diego on January 30
- We will be presenting alongside intake to Crossroads Family Center staff on SDRC services on February 5<sup>th</sup>
- Clorinda, Noemi, and Jennifer will be attending Leading the Charge in Imperial County, and we will be leading the interpretation throughout the event
- We will be attending the TRACE agency fair on February 6
- Bernadette, Ysabel Yumol, and I will be attending the 2025 Autism Social and Mental health Conference to provide information on our services and provide interpretation for the conference on February 7

### **Training** – *Johanna Stafford*

- The first Foundations for Success cohort began on 1/26/2025 and will continue through 2/6/2025, and does include the 2 day PCT Training component. The next Foundations cohort will begin on Monday, March 10. Beginning with March 10 cohort, Training Team is requesting registration through LEAP in order to track attendance/participation more efficiently. The Training Team has also implemented competency/knowledge checks throughout the 2 weeks. Feedback will be provided to all participants and managers.
- PCT training will be available again on Wednesday and Thursday, 3/26 and 3/27, for all existing staff who have not yet taken the training. This is required and is foundational to many of the changes being implemented by DDS like the new SIPP.
- SIPP office hours continue....please watch for email notifications.
- SIPP training for individuals and families will be on Tuesday, 2/4, via zoom, at 10:00am and again at 6:00pm. Registration is required and translation will be available based on requests. Pamela Starmack, Communications, has sent out an email blast to individuals and families.
- JLB, Cultural Humility, continues through June 2025. Please register for an available session if you have not already done so. Session 2 make-up sessions will be on February 20, registration is also in LEAP.

## **Administrative Support** – *Maria Hanks*

- We hope everyone had a wonderful start to the new year. It's certainly a busy time as we work to keep up with all the changes happening around us.
- Office Managers have been diligently working on learning the new IPP agreement and IPA amendment as well as understanding how to properly enter the new data fields and ensuring the information is recorded accurately.
- We are thrilled to announce that Ernesto Zuniga has successfully completed a paid internship program and has now joined the South Bay Support Group. Welcome aboard, Ernesto!
- A huge congratulations to Celia Hernandez for her promotion to Administrative Support for the Client Services Directors. Well done, Celia!
- A big shout-out to Office Managers Laura Gonzalez and Jose Gonzalez for meeting the deadline to have all business office documents scanned in preparation for the move to the Balboa building. A special thank you to Karla Vargas for assisting temporary staff on this project. Great teamwork!
- The Business Office will begin its move during the week of January 21st.
- Joey Gonzalez, Office Manager in Santee, is actively preparing for the upcoming office move to La Mesa, scheduled for April.
- Jose's team in Records has noticed an increase in IPP Signature Sheets being submitted incomplete or with discrepancies in dates. Please take a moment to review forms thoroughly before sending them to Records. Your attention to detail helps streamline our processes and ensures accuracy.
- Yesenia Gaxiola's entire team has been assisting clinical with uploading eligibility documents for psychology review due to the volume. Teamwork!
- Special projects: Joey, Emilia and Leslie want to thank the PMs for their timely response to IPPs that need attention as we try to improve our timelines.
- We currently have administrative vacancies in Carmel Mtn, Santee, and Kearny Mesa. We have also been allocated two administrative positions that we will be recruiting for.
- Thank you all for your hard work and dedication. Let's continue to make great strides together in the new year!

# YOUR WORK MATTERS.

everyday that you show up,  
even when it's hard and when you don't feel like it,  
you are making a difference.

so, even on the hard days —

even on the days where you'd like to hang  
back and not show up —

remember: the world needs the magic inside of you.

your work matters.

your consistency matters.

your ideas matters.

your presence matters.

so, keep it up.





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Serving individuals with developmental disabilities in San Diego and Imperial Counties

**DATE:** February 11, 2025  
**TO:** Board of Directors  
**FROM:** Celeste Graham, Director of Clinical Services  
**RE:** Clinical Services Department Report (Q3 through January 2025)

**Department-Wide:**

- Welcomed new Director Celeste Graham PT on October 7, 2024.
- Held the first Quarterly Clinical Services Team meeting on December 19, 2024 following the absence of a Director. The meeting also included Administrative Support Assistant (ASA) team members who support Clinical. Staff engaged in team building activities and discussed a shared vision for the department for 2025, including “rebranding” of Clinical Services to promote improved understanding of the team’s roles within SDRC and in collaboration with external partners.
- Launched a multidisciplinary workgroup on January 14, 2025 for a new Quality Improvement project related to Eligibility Decisions. The workgroup includes an ASA, Physician Consultant, Director, Intake Managers, and Intake Coordinators and is facilitated by QI consultant Phyllis Virgil.

**Intake Services:**

- Intake Coordinator represented and participated in the 3<sup>rd</sup> Annual CA American Indian IDD Symposium October 9 – 11, 2024, including providing information on eligibility for SDRC services to families and other community organizations in attendance.
- Compiled data regarding number of eligibility decisions made from January 1, 2024 through December 17, 2024 = 1680 (an increase from 988 decisions in 2023).

**Behavior Services:**

- The Behavior Modification Review Committee (BMRC) annual report for calendar year 2024 was compiled and submitted to DDS Director Pete Cervinka on January 24, 2025, in accordance with Section 50823, Title 17, California Code of Regulations. The summary included status updates for 9 clients for whom the committee continues to review for least restrictive interventions and supports to address behavior challenges.

**Psychological Services:**

- Vacant Coordinator position with ongoing recruitment efforts and interviews in progress January and February 2025 through Columbus staffing agency.
- Two Psychologist vendors have been designated for psychology assessment reviews and members of the Developmental Disabilities Screening Team (DDST), both of whom also serve as shared resources with Early Childhood Services for eligibility determination.

**Nursing Services:**

- Vacant Coordinator position with ongoing recruitment efforts and interviews in progress February 2025.
- Established Nursing Team representatives for cross-department collaborative workgroups to develop guidelines for referral criteria for two new vendors: Mobile Lab Services and Medic Alert.

**Physician Consultant Services and Dental Coordinators:**

- Dental Coordinators Denise Anderson and Eden Samson advocated with various dental providers to apply for the State of CA Specialty Dental Clinic Grant, with a decision made at end of 2024. The \$5M grant will be awarded to Dr. Maxmillian Chambers of El Centro in July 2025. The vision is to establish two Dental Ambulatory Surgical Centers in both Imperial and San Diego Counties, which will include a traditional dental office, a surgical center to provide dentistry to individuals requiring sedation in order for their dental needs to be met, and a separate desensitization program. The projected grand opening in Imperial County is anticipated in 2026.



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**DATE:** January 31<sup>st</sup>, 2025  
**TO:** Board of Directors  
**FROM:** Miguel Larios, Director of Community Services  
**RE:** Community Services Director’s Report: October 2024- January 2025

### **Community Services: Mission Statement**

The mission of the Community Services Department: To provide high quality and meaningful services that are reflective of the diversity of the community of people served by San Diego Regional Center in collaboration with families, agency staff, and community partners. The Community Services Department develops community partnerships through outreach and education about issues and services affecting individuals with developmental disabilities.

### **Direct Support Professional (DSP) Training Stipend Program**

DDS’s Workforce Initiatives aim to recruit, train, and retain workers from diverse communities who support individuals with intellectual and other developmental disabilities. Several Workforce Initiatives are being implemented to promote career advancement for Direct Service Professionals (DSPs) through competency-based training, stipends, pay differentials, and ongoing professional development. Beginning September 1, 2023, DSPs may receive up to two \$625 (before taxes) stipends when they complete online training courses approved by the Department of Developmental Services available in the ARCA Learning Center. The DSP Training Stipend Program ended on 08/31/24, and all courses must be completed by that date, SDRC has verified and completed paying out the stipends.

### **DSP Trainings Stipends completed by SDRC vendors:**

- Total paid out to DSP Employees: \$ 8,918,700.00
- Processed: 11,433 Trainings
- Currently in the process of paying out 35 trainings



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## Direct Service Professional Internship Program:

*The DSP Internship Program is a three-month training and internship program that provides standardized, new direct care workforce, entry-level training and practical work experience. This program will focus outreach efforts on populations that reflect California's diverse population and do not traditionally have a pathway towards jobs in the field of providing services to individuals with developmental and intellectual disabilities.*

### Updates:

- As of September 18, 2024
  - 47 interns placed
  - 12 interns converted to become DSPs
    - (3) ACRC, (2) FNRC, (5) SDRC, and (2) VMRC
- Statewide launch of DSP internship program: Guidance issued on August 30, 2024
- Regional center walkthrough conducted on September 10, 2024
- Upcoming Community Webinar scheduled early October

## Home and Community Based Services

On March 14, 2014, the federal Centers for Medicare & Medicaid Services (CMS) set forth The Final Rule (requirements) for homes and programs where Home and Community-Based Services (HCBS) are delivered. Vendors must meet these criteria in order to qualify for federal funding under the Medicaid program (called "Medi-Cal" in California). San Diego Regional Center (SDRC) is devoted to assisting our vendors in meeting the rules.

Centers Medicare Services (CMS) and the Department of Developmental Services (DDS) are requiring the following timeline for SDRC to report in person visits to all HCBS providers identified to operate within the services listed on the Directive Enclosure.

DDS is requiring SDRC to report the following at the end of each quarter – Number of Visits, Number of Vendors found in Compliance, Number of Vendors found to be working towards Compliance (Corrective Action Requests), Number of Vendors who are issued a Corrective Action Plan (CAP), Number of Vendors who are not able to comply with their CAP and Number of Vendors who are Appealing the CAP. SDRC's goal is to work with each vendor before issuing CAP.

SDRC HCBS Monitoring Visits: 100 % percent of all required HCBS monitoring visits have been completed.

SDRC HCBS Compliance: 100 % percent of all settings reviewed are compliant with HCBS Final Rule settings.

All Vendors who have filed an Appeal must be determined to be in compliance and appeal completed by December 31, 2024. SDRC did not have any appeals.



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## Department Highlights

- Behavior Respite Roundtable: 10/09/24 - 4 providers attended; hosted by Sandra Bishop, Resource Coordinator.
- Coffee with Community Services: 10/28/24 - 67 providers attended; 11/25/24 - 103 providers attended; 12/30/24 - 36 providers attended, 01/27/25 - 61 providers attended; hosted by the Community Services Department.
- Coordinated Family Supports Roundtable: 11/14/24 - 11 providers attended; hosted by Nicole Goetz, Resource Coordinator.
- Supported Living Roundtable: 10/16/24 - 41 providers attended; and 11/20/24 - 36 providers attended; 01/15/25 - 35 providers attended; hosted by Raquel Zaragoza, Resource Coordinator.
- Residential Vendor Roundtable: 10/03/24 - 49 providers attended, 11/07/24 - 48 providers attended; 12/05/24 - 32 providers attended, 01/02/25 - 36 providers attended; hosted by Liliana Calderon, Residential Services Coordinator.
- Fiscal Management Services (FMS) Roundtable: 10/01/24 - 13 providers attended; 11/05/24 - 10 providers attended; and 12/03/24 – 12 providers attended; 01/07/25 – 16 providers attended; hosted by Gwen Noll, Resource Coordinator.
- Independence Facilitation Roundtable: 10/15/24 - 24 providers attended; 11/19/24 - 14 providers attended; and 12/17/24 - 19 service providers attended; hosted by Gwen Noll Resource Coordinator.
- In-Home Respite Roundtable: 12/03/24 - 31 providers attended; hosted by Sandra Bishop, Resource Coordinator.
- Early Start Roundtable: 12/04/24 - 101 providers attended; hosted by Kristin Van Den Broek, Resource Coordinator and Sarah Franco, Manager of Client Services.
- Family Home Agency Roundtable: 11/21/24 - 4 providers attended; hosted by Naomi Carpenter, FHA Coordinator.
- Specialized Residential Roundtable: 10/22/24 - 7 providers attended; hosted by Jesus Espinoza, Resource Coordinator and Erin Rodriguez, Resource Coordinator.



- **It is my pleasure to announce the following updates to the Community Services Department:**
- Erika Gil has accepted a resource coordinator position in our department. She will be assisting us with Social Rec and Transportation. Erika is currently the Senior Social Services Program Director at the YMCA. Erika has been working with the YMCA for ten years, where she has held several positions such as: Quality Assurance Lead (Respite and Daycare), Respite Quality Specialist, and Respite Case Manager. Her start date will be on 12/30/24 and her supervisor will be Saralynn Keenan.
- Erika Tuhwe has accepted a Resource Coordinator position in our department. She will be assisting us with Participant Directed Services. She is currently a Service Coordinator in Unit 10 (CPP). Prior to that, she was a Service Coordinator in Unit 34 (Eastlake Adult-in home) and prior to that she worked at Easter Seals as a Life Skills Coach for 9 years. Tiffany Swan will be her direct supervisor and her start date is to be determined. Erika has a Bachelor's of Science in Psychology.
- Victoria Cazares has accepted a Resource Coordinator position in our department. She will be assisting us with Residential Services (113s). She is currently a Service Coordinator in Unit 12 Adult In-Home (Main Center). Prior to that, she was a Behavior Technician at HOPE Comprehensive Center for Development. Brian Uribe will be her direct supervisor and her start date is to be determined. Victoria has a Bachelor's Degree in Cognitive and Behavioral Neuroscience from the University of California San Diego.
- Azael Rodriguez has accepted the position of Evaluation Specialist in our department. He will be assisting us with non CPP Quality Assurance. He is currently a Service Coordinator in Unit 34 Adult In-Home (Eastlake). Prior to that, he was a TDSO/ILS Facilitator at Creel Industries for 4 years. His start date is to be determined. Azael has a Bachelor of Arts Degree in Psychology from the University of California, San Diego.
- Rosalie Goulding has accepted the position of Community Services Manager in the Community Services Department. She has been working with the San Diego Regional Center since 2019. She started as a Floater for Early Start and then transferred to Unit 13 (Early Start, Main Office) as a Service Coordinator. She then transferred to Community Services in April 2022, as the Resource Coordinator for Early Start, Behavioral, and Psychological Services. During her time as a Resource Coordinator, she built positive partnerships with community partners, such as Acorns to Oak Trees; the first vendorized tribal organization within the state of California. She accepted the Rates Team Lead position at SDRC in February 2024. As the Rates Team Lead, she has been collaborating with multiple departments within SDRC, and DDS to develop procedures needed to implement Rate Reform and the Service Code Crosswalk. She is also part of the Retro-POS Quality Improvement team.





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## MEMORANDUM

**DATE:** February 4, 2025  
**TO:** Board of Directors  
**FROM:** Seth Mader, Chief Information Officer  
**RE:** IT Department Report

### **Increasing Computer Network Stability**

You may not know, but SDRC has its own physical, computer data center housed at the Ruffin Rd. office. The data center has routers, switches, firewalls, servers, uninterruptable power supplies (UPS's), independent air conditioning systems, halon fire suppression system, etc. When part or the entire data center goes down, the company is unable to work. Data center instability can be caused by long power outages, internet disruptions, etc. The IT department is trying to move parts of the data center into cloud hosted services a little at a time, to improve network stability. Even a small cloud migration can take many, many months of work.

In the meantime, in an attempt to increase stability, we will be moving the physical data center offsite to a computer network hosting location or colocation. The company that runs the site has armed guards, a metal detector at the entrance, redundant electricity, redundant air conditioning, redundant internet, and has a building that is disaster resistant. We are hopeful this move will help protect our physical data center, while we attempt to move more of it into the cloud.

### **DDS Mandated SANDIS Enhancements**

There are several new initiatives mandated by DDS for all regional centers that went into effect January 1<sup>st</sup>, 2025. Some of these effected SANDIS.

1. Standardized Statewide Individual Program Plan (IPP)
  - Because there is no IPP structure/format requirements written in statue, IPP's vary widely at all 21 regional centers. If a person served by one regional center moves to a different regional center's catchment area, they may need a new IPP developed which can be disruptive for that person and their family.
  - Information contained in all the different IPP's for the 21 regional centers is also not standardized. Further, that information is not sent to DDS.
  - DDS has now created a standardized IPP and Agreement & Signature Form all regional centers are required to use effective January 1<sup>st</sup>, 2025.





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- To track the information in the IPP and Agreement & Signature Forms, DDS has asked these forms be programmed into SANDIS so that information can electronically be transmitted to DDS.
2. Tracking New “Foundational Data”
- If you were at the Annual Board meeting, you may have heard the DDS Director, Pete Cervinka, mention DDS would now be tracking additional data related to the individuals regional centers’ serve to better understand trends.
  - The new Foundational Data will be tracked in SANDIS so that information can be shared with the Department. The data can be categorized by 5 general types of information.
    - Additional preferred language types. As well as which language they prefer to speak at home, speak outside the home, and/or read.
    - Additional identified race or ethnicities. The current list in SANDIS was expanded to include more options to identify as, in the hopes there would be less individuals categorized as “Other”.
    - Additional residents types. For example, rather than having only one residents type labeled “transient/homeless”, there will now be separate residents codes for homeless, housing unstable including transient, or living in a hotel/motel. The hope of having the choice of selecting more specific housing types is to get a better understanding of how different living conditions utilize different supports and services.
    - Updating Status Codes. Individuals receiving regional center services are classified as having different status codes depending, in part, how they are being served by the regional center. For example, if someone is going through our Intake process, they are given a status of 0 in SANDIS. If they are being served by the Early Start program, they are given a status of 1. DDS has created a new status code of M that stands for Monitoring. There are times when a regional center doesn’t want to close an individual’s case, but may not be able to comply with state and federal statutes. This could be because they are in jail, living temporarily out of state, etc.
    - Sexual Orientation and Gender Identity (SOGI). Regional centers can now have a way to accept and document information related to an individual’s preferences. These include preferred name, pronouns, both sex at birth and gender identity, and sexual orientation.



**Date:** February 4, 2025  
**To:** Board of Directors  
**From:** Pamela Starmack, Director of Marketing & Communications  
**RE:** Marketing & Communications Report

## ADVERTISING

**KSDY 50 TV** - reaching 273,600 Spanish-speaking households in San Diego and Mexico. Over the holidays, we took advantage of a special offer for an in-studio interview, which ran 5 times during KSDY's holiday segment. Delia Camacho, Program Manager, was once again our spokesperson. She addressed the questions below.

1. What is a Regional Center?
2. Who is eligible for SDRC services?
3. What is the process for accessing services?
4. What services are available through the regional center specifically for adults?

Watch her interview at the 1:40:03 mark.

[https://www.youtube.com/watch?v=wSY9D\\_IM7NA](https://www.youtube.com/watch?v=wSY9D_IM7NA)

[KSDY 50 - Official Website](#)

## Digital Ad Campaigns with Feathr

Services and We're Hiring ads - overview from Sep 7, 2024, to Jan 31, 2025 (all threshold languages) Ads have appeared on over 345,000 users' phones (called impressions), and over 87,657 people have viewed the ads (called reach).

Maximizing reach and impressions are top digital marketing and social media strategy priorities. Both can be pivotal in building brand awareness and an engaged audience.

Collectively, campaigns have been clicked on 1,825 times, driving an above-average (.1-.3%) click-through rate of .53%. Hiring ads received 18 clicks to apply now. This tells us that our creatives are engaging with our audience at a healthy rate.

Read the full report: [Feathr Report](#)

### Service Ads



## Hiring Ads

**The San Diego Regional Center Is HIRING!**



**APPLY TODAY!**



**Join Our Team!**

We are a dedicated team, passionate about making a meaningful difference in the lives of people with developmental disabilities.



**APPLY TODAY!**



**Enjoy the Perks...**

- 15 vacation days • 10 days of sick leave
- 12 annual holidays • Flexible schedules
- Health benefits • And more!



**APPLY TODAY!**



## Giving Back Magazine

San Diego Regional Center



Improving people with developmental disabilities.

Support a child or loved one's needs in support services with a dedicated team of staff or help us help you with the ongoing plan.

When you need the help, we'll be there to help you get the most out of your life.



**Call Us Today,**  
 24 Hours a Day, 7 Days a Week  
 (619) 476-4355  
 Regional Center Development & Support  
 (619) 476-4355



Let us help California Early Start to enhance and extend the best programs that provide FREE assessments to babies and toddlers (18m-36m). It's our goal to provide critical therapeutic services and training to help the early impact upon a child's development.

Call San Diego Regional Center (SDRC) (619) 476-4355  
 Regional Family Resource Center (RFRC) (619) 476-7419  
 to learn more!



**WE ARE THE STARTING POINT**  
 for people living with mental or physical disabilities.

**CALL US TODAY!**  
 (619) 576-8355  
 We're open!

At San Diego Regional Center, we provide support services for people with mental or physical disabilities to help them live their lives to the fullest. We are committed to providing the best care possible for our clients and staff. We are committed to providing the best care possible for our clients and staff. We are committed to providing the best care possible for our clients and staff.



## North County Informador Magazine

¿Su hijo está cumpliendo sus metas del desarrollo? Permítanos ayudarle.



¡Ayudamos! Trabajamos en California, California Early Start, es un programa gratuito para el desarrollo de niños con discapacidades mentales o físicas. Es un programa de servicios de apoyo y capacitación para ayudar a los niños con discapacidades a cumplir sus metas.

llamé al Centro Regional de San Diego (SDRC) (619) 476-4355 o al Centro de Recursos Familiares (RFRC) (619) 476-7419.



**¡El Centro Regional de San Diego está CONTRATANDO!**  
 ¡Ayudamos a hacer una diferencia significativa en la vida de las personas con discapacidades del desarrollo!



¡Ayudamos a hacer una diferencia significativa en la vida de las personas con discapacidades del desarrollo!

Algunas de las ventajas de trabajar con nosotros:

- Salario competitivo
- Oportunidad de crecimiento
- Flexibilidad de horarios
- Ambiente de trabajo positivo
- Oportunidad de capacitación
- Más que un trabajo, una oportunidad

¡Contáctanos hoy!

llamé al Centro Regional de San Diego (SDRC) (619) 476-4355 o al Centro de Recursos Familiares (RFRC) (619) 476-7419.



Si usted tiene alguna preocupación o pregunta sobre el desarrollo de su hijo, ¡nosotros estamos aquí para ayudarle!



¡Ayudamos! Trabajamos en California, California Early Start, es un programa gratuito para el desarrollo de niños con discapacidades mentales o físicas. Es un programa de servicios de apoyo y capacitación para ayudar a los niños con discapacidades a cumplir sus metas.

llamé al Centro Regional de San Diego (SDRC) (619) 476-4355 o al Centro de Recursos Familiares (RFRC) (619) 476-7419.



## Filipino Press

The San Diego Regional Center... Empowering People with Developmental Disabilities.

When a child is born with a developmental disability, it's not the end of the world. With the right support, your child can thrive.

At the San Diego Regional Center, we help your child reach their full potential. Our services are designed to help your child learn, grow, and live a meaningful life.

**Call for More:**  
 619-495-4338  
 4400 La Jolla Village Drive, Suite 100  
 San Diego, CA 92161



Your Journey Begins With Us.

At the San Diego Regional Center, we offer lifelong support and services, building meaningful relationships with families, friends, and the community.

We help you empower your child and yourself. Our services are designed to help your child learn, grow, and live a meaningful life.

Discover how we can help you and your loved one with special needs. Call today. It's time.



## Voice & ViewPoint Newspaper

**The San Diego Regional Center is HIRING!**  
 We are seeking to make a meaningful difference in the lives of people with developmental disabilities.

Participate in our research and help us learn more about the needs of people with developmental disabilities. We are looking for individuals who are interested in research and want to make a difference.

**Some of the perks:**

- Flexible schedule
- Paid training
- Flexible work schedule
- Remote work options
- Supportive environment

For more information, please contact us at 619-495-4338 or visit our website at [www.sdrcc.org](http://www.sdrcc.org).



Is your child reaching important developmental milestones?

Early identification of developmental delays is key to getting the most out of the classroom your child is in.

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**SAN DIEGO AREA NEWSBYTES**  
 City of San Diego Selected to Participate in National Early Learning Initiative

The City of San Diego is proud to be selected as one of the first cities in the nation to participate in the National Early Learning Initiative. This initiative is a partnership between the U.S. Department of Education and the U.S. Department of Health and Human Services.

The initiative aims to improve the lives of young children and their families by providing high-quality early learning and care opportunities. The City of San Diego will be providing early learning and care opportunities for children from birth to five years old.

**The San Diego Regional Center is HIRING!**

Participate in our research and help us learn more about the needs of people with developmental disabilities. We are looking for individuals who are interested in research and want to make a difference.

**San Diego Recruitment for Nation's Largest Security Force Announced**

The San Diego Regional Center is seeking qualified individuals for a variety of positions. We are looking for individuals who are interested in research and want to make a difference.



## San Diego Family Magazine Babies and Toddlers Publication

Is Your Baby Reaching Important Milestones?

If you have concerns about your child's development, we are the starting point.

CONTACT US  
 San Diego Regional Center  
 at 619-495-4338  
 or visit our website  
 Exceptional Family Resource Center  
 at 619-495-4338  
 for a FREE evaluation  
 at home.



Is Your Child Meeting Important Milestones?

Early identification of developmental delays is key to getting the most out of the classroom your child is in.

San Diego Regional Center  
 4400 La Jolla Village Drive, Suite 100  
 San Diego, CA 92161  
 619-495-4338



Are you concerned about your child's development? We are the starting point.

The San Diego Regional Center can help with FREE evaluations for your child. If you have concerns about your child's development, we are the starting point.

Call us today / Mimosas hoy  
 (619) 495-4338 or (658) 495-4338





## SOCIAL MEDIA

Followers are on the rise across all platforms!



### Highlights from January:

- Facebook: Increase in content this month - posted 74 times (posts, Reels, and stories)!
- YouTube: 12 new subscribers (we typically receive 2-3 new subscribers month over month)
- Most popular posts across platforms: Annual Board Meeting recap, Meet Lisa, and Love on the Spectrum Casting Call flyer

Unrelated to this report, the Meet Lulu Reel on Instagram continues to be seen by thousands! We get daily notifications of new accounts liking Reel. It currently stands at 115,000 views and 1,091 likes and is increasing! Take a look: [Meet Lulu: The Queen of Confidence](#)

### Video Production

Our growing social media impressions are largely due to the stories we share with video. You can find them on our YouTube page at [@SDRRegionalCenter](#).

Recent projects:

[Meet Lisa: Singer and Self-Advocate](#)

[Meet Walt: The Boy with an Infectious Smile](#)

### Other

We'll soon announce an updated **glossary of terms** to our team, clients & families, other regional centers, and the community. The 85-page booklet is currently being reviewed. Stay tuned!

### Board Members

In continuing our efforts to interview families and their journey with SDRC, I invite you to participate and share your story. Please let me know if you're interested. The video will be posted on our website and social media.

## **Announcing**

The Quality Improvement Communications Team



QI Communications team was established in September 2024 to highlight and promote the impactful work of SDRC Quality Improvement Teams; by ensuring your achievements are shared widely, effectively, and in ways that connect with families and the individuals we serve, SDRC staff, our Board, and community partners.

Our goal is to collaborate closely with your teams to better understand your initiatives, goals, and work progress. We'll identify key messages, develop compelling narratives, and select the most effective communication channels to ensure clarity and engagement to reach our diverse audience.

### **QIC's MISSION STATEMENT:**

To foster a culture of continuous improvement by delivering clear, timely, and impactful messages, and enhance awareness of progress. Through collaboration and strategic communication, we aim to inspire engagement and enhance awareness among employees, partners, and the individuals and families that we serve.

The team: Kiera Clubb, Heather Resnick, Yesenia Gaxiola, Patrick Grossman, Mark Martin, Diana Perez, and Pamela Starmack.

American Rescue Plan Act (ARPA) Funded Early Start Pilot Project  
**San Diego Regional Center | Final Evaluation Report**

DECEMBER 2024

In response to the significant impact the COVID-19 pandemic had on the special needs system of care, Section 2014(a) of the American Rescue Plan Act (ARPA) of 2021 provided supplemental grant funds for early intervention services for infants and toddlers under Part C of the Individuals with Disabilities Education Act. The California Department of Developmental Services (DDS) – the entity that implements Part C through the regional center service delivery system – received one-time funding for Early Start. DDS contracted with regional centers throughout California to implement pilot projects to strengthen the early intervention service system.

The goal of San Diego Regional Center’s (SDRC) pilot project was to increase awareness of and enrollment in Early Start services in Imperial and San Diego Counties, particularly among families experiencing homelessness and those hesitant to access Early Start services due to concerns about their immigration status.

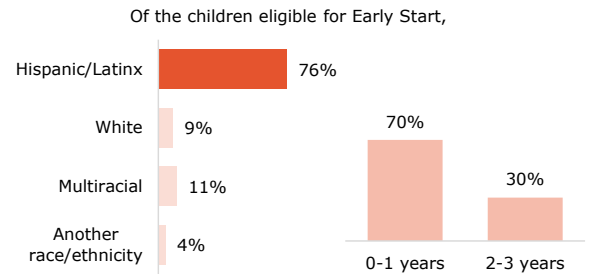
DDS partnered with Harder+Company Community Research to conduct an evaluation of SDRC’s pilot project to explore how the program was implemented, its impact, as well as key lessons learned. Findings were informed by data collected between June 2022 and November 2024 including program progress and evaluation reports; surveys and testimonials; and interviews with regional center staff.

**Key Findings**

**In Imperial County, 168 children were screened to identify a potential developmental delay or disability; 76 children were eligible for and connected to Early Start.**

Staff in Imperial County administered screenings at 113 events including attending the Westmorland Community Food Pantry, Calexico Neighborhood House Christmas Festival, and Heber Community School Parent Fair. Over three-quarters of children connected to Early Start were Hispanic/Latinx.

- 168** children **screened**
- 137** children **referred** for further assessment
- 76** children **eligible** for and connected to Early Start services

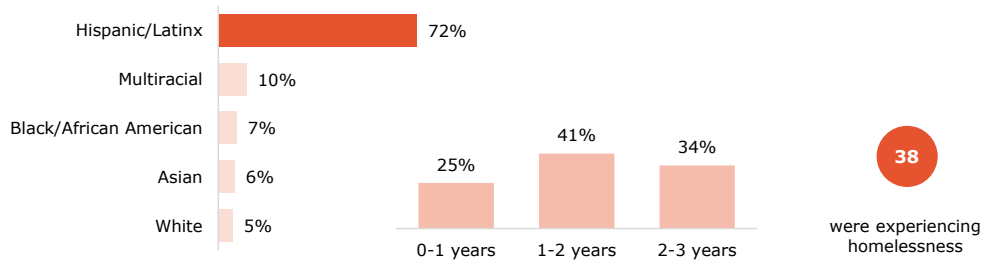


**In San Diego County, 501 children were screened to identify a potential developmental delay or disability; 137 children were eligible for and connected to Early Start.**

Staff in San Diego County administered screenings at 124 events including attending community resource fairs and scheduled visits to local homeless shelters including Father Joe’s Village, San Diego Rescue Mission, and Doors of Hope. Screenings were also completed twice a month at the Ventanilla de Salud at the Mexican Consulate. Of those connected to Early Start, the vast majority were Hispanic/Latinx and 38 were experiencing homelessness.

- 501** children **screened**  
*130 were experiencing homeless*
- 322** children **referred** for further assessment
- 137** children **eligible** for and connected to Early Start services

Of the children eligible for Early Start,



**Success Stories**

Maria learned about Early Start services at Father Joe’s Village when an SDRC Outreach Coordinator was visiting the homeless shelter to talk to families about Early Start. [Her daughter] was demonstrating delays in all areas of her development and received a referral to her local regional center. Her daughter is currently receiving infant education services at the homeless shelter and has been referred for physical therapy.



Julia’s mom observed signs of autism in her 22-month-old daughter. She attended an SDRC outreach event held in collaboration with Head Start, and she learned about the Early Start program. Given her concerns, she was connected to the regional center where her daughter was screened and assessed. Her assessment showed she was eligible for Early Start, and she began receiving services within two weeks of the referral. She had not shared her fears about her daughter’s development with anyone. Early Start provided her with valuable information regarding autism and her child’s development. Julia has been receiving Early Start services for six months and her mom has seen a difference in her development. Julia is now responding to her name, beginning to use words, and is becoming interested in play.



## Culturally relevant strategies were used to engage hard-to-reach families.

SDRC staff in Imperial and San Diego Counties initially faced challenges reaching some of the catchment area's highest need families. Some families didn't feel comfortable sharing private information, didn't have a home of their own (or didn't know what their living situation was going to be in the future), were fearful that participating in Early Start would affect their immigration status, and/or were reluctant to acknowledge their child may have a developmental delay due to cultural stigmas around disabilities. In response, SDRC staff:

- **conducted in-person visits to homeless shelters** and temporary housing locations
- **traveled to remote areas** of the county to conduct visits at convenient times for families
- **were mindful of the language** they used when discussing a potential developmental delay, recognizing the emotional impact this information can have on families
- **facilitated a warm hand off** between the provider who conducted the screening and the provider who would be completing the follow up assessment

**"Before the pilot, the shelters would not let us in. They didn't know us so we just kept at it and were persistent and demonstrated to them that we would do what we said we were going to do. We kept coming back, we kept showing up, we built the trust for them to keep allowing us to come back."**  
-SDRC staff member

## Lessons Learned

Data suggests the SDRC's pilot project was successful in achieving its goal to increase awareness of and enrollment in Early Start services particularly among higher need populations. The following lessons learned were gleaned from SDRC's progress and evaluation reports, along with interviews with SDRC staff members.

- ▶ **Have a consistent community presence to help build trusting relationships with families.** Staff in Imperial and San Diego Counties attended numerous events to help raise awareness of the importance of early developmental screenings. Having a constant presence at these events was an impactful way of reaching individuals who would otherwise may not have known about available services. One SDRC staff member shared, "We were able to provide information to families and then they in turn shared that information with their friends and their other family members. We've seen them at other community events where, they say 'oh yeah, my sister gave me your information, or I heard about you from my Tia.'" Staff also shared the grant allowed them to train other regional center staff, increasing their capacity to participate in community events. One SDRC staff member shared, "We now have a spreadsheet of people that have been trained and that we can utilize for big outreach events."
- ▶ **Hire dedicated staff to follow-up with families.** SDRC staff shared one of the key successes of the project was having dedicated staff to be present at outreach events and to follow up with families to ensure children didn't "fall through the cracks." One SDRC staff member shared, "[Pilot project staff] weren't carrying caseloads so it gave them time to follow the child through intake until they're assigned a service coordinator and have their meeting...and that would have been almost impossible to ask them to do with the caseloads counts they had before."
- ▶ **Hire bilingual staff to increase access to services for Spanish-speaking families.** Given the high percentage of Spanish-speaking families in the service areas, bilingual staff were essential to ensure families felt comfortable and supported in accessing services. One SDRC staff member shared, "In the Valley, we have a lot of Spanish speaking families so having someone that speaks the language and has the flexibility to move their schedules to the evening or work on the weekends was instrumental."

### **ARCA Standard – Legislative Activity**

#### Focus Area and Scope of this Standard

- This standard applies only to activity undertaken by one or several regional centers organizationally or through their respective Executive Director or board members, on proposed statewide legislation, including Budget proposals to which ARCA has established a formal position.
- This standard does not apply to legislative or other activity a regional center undertakes on local political matters (*e.g.*, matters pending before local government entities).

#### Definitions of Words Used in this Standard

1. **Sponsored:** A bill developed by ARCA, or for which the Association is a lead advocate. A sponsored bill is usually ARCA's highest legislative priority.
2. **Support:** This position reflects ARCA's commitment to the legislation becoming law.
3. **Support if Amended:** This position signifies that the legislation needs changes to be beneficial. If the requested changes are made, ARCA is automatically in support of the bill.
4. **Neutral:** This reflects a change away from a position of active advocacy. It is primarily taken on bills that ARCA previously opposed unless amended, which have been amended sufficiently to address identified issues. Then, a "neutral" position automatically occurs.
5. **Oppose Unless Amended:** This position reflects that the legislation needs changes to render it not detrimental. ARCA is opposed to the bill, but if the requested changes are made, ARCA will move to Neutral.
6. **Oppose:** This position reflects that the bill is unacceptable to ARCA and its members as it would conflict with principles, policies, and the philosophy of the organization. The bill likely could not be amended sufficiently for ARCA to take a neutral position; ARCA has an interest in defeating the bill. If the bill is amended sufficiently to remove the reasons for opposition, a Neutral position is taken.
7. **Watch (+/++/+++):** These notations indicate a bill ARCA is publicly tracking but is not formally engaged with and its Board of Directors has not taken a position on. No advocacy to support, oppose, or change the bill is pursued. All such bills are reviewed by the Legislative Committee.
8. **Position Pending:** This is a significant bill that ARCA is tracking but has not formally taken a position on but anticipates it may as the bill evolves.
9. **No Consensus:** This formal position refers to bills for which there is no consensus view among ARCA's members.

#### Background/Why this is Important

- One of the core functions of ARCA is to advocate through the state legislative and budgetary processes for the formal positions adopted by its Board of Directors, or, when necessary, its

Executive Committee. Success in this area for the benefit of California's developmental services system requires regional centers present a unified position and speak with a single voice consistent with established positions.

#### Standard

- ARCA's Board of Directors has the authority to establish formal budgetary or legislative positions and publicly share these in formal position statements. When necessary due to legislative timelines, ARCA's Executive Committee may establish formal legislative positions on behalf of the Association between meetings of the full membership. Every effort will be made to ensure these positions are informed by the perspective of ARCA's Legislative Committee. Prior to the establishment of ARCA's formal positions on significant legislative or budgetary positions, board members will be given the opportunity to engage in debate and discussion that will inform the final formal position statement.
- If ARCA has adopted a formal legislative or budgetary position, regional centers will not take actions that undermine ARCA's position or establish their own formal positions that differ from or specifically oppose those of the Association. Formal legislative positions include: 1) Sponsored; 2) Support; 3) Support if Amended; 4) Oppose Unless Amended; and, 5) Oppose.
- If ARCA's formal position is Position Pending, regional centers will not engage in independent political activity on the legislation.
- If ARCA's formal position is No Consensus or it does not have a formal position, regional centers may engage with the legislation, including the adoption of formal local positions.

#### Related Legal Requirements

- Article IV, Section 6 of ARCA's bylaws notes a prohibition of regional centers "engag[ing] in conduct materially and seriously prejudicial to the purposes and interests of ARCA."

#### Indicators of Performance

- Implementation of the basic requirements of this standard is evidenced by the absence of regional center organizational, Executive Director, or board member political messaging, either private or public, that conflicts with the established formal positions of the Association.
- This standard does not lend itself to quantifiable metrics, but high performance in this area is evidenced by supportive engagement in local communities consistent with ARCA's established political priorities, including through various channels of legislative communication.

#### Range

- Regional center political action to advance ARCA's formal legislative and budgetary positions is voluntary. The degree of engagement in this area is decided by local leadership and decision-making.
- Given that formal action on legislation is taken in Sacramento but is oftentimes informed by the perspectives of local constituents, the average regional center engages in activities in support of ARCA's budgetary and priority legislative positions through its social media channels and in meetings with local legislators and/or their staff. This may be accomplished through participation

in ARCA's annual Grassroots Day and use of ARCA-generated social media posts and action alerts.

- High performance in this area includes local activities in alignment with ARCA's formal positions under the direction of local leadership. This may include but is not limited to pursuit of media coverage, encouraging other organizations and/or community members to engage politically in support of ARCA's position, promoting ARCA's established positions through legislative testimony, and ongoing discussions with key legislative leaders.

#### Resources Available

- ARCA's bill file with a comprehensive listing of its established political positions as well as copies of many of its formal legislative letters can be found [here](#).
- ARCA's Legislative Committee provides recommendations to the Association on formal political positions. Any member of ARCA's Board of Directors is welcome to attend meetings of the Legislative Committee.
- ARCA employs registered lobbyists and has a contract with a Legislative Advisor, any of whom are available to consult with individual regional centers to support their legislative activity, including bill tracking and engagement.
- ARCA staff consult with a communications firm to assist with traditional and social media messaging on key legislative and budgetary positions that can be leveraged for political activity at the local level.
- ARCA staff are available to conduct local training sessions on legislative advocacy upon request.
- ARCA staff coordinate an annual Grassroots Day to provide regional center members with an opportunity to advocate for key legislative and budgetary processes with legislative members and their staff.

#### Example

- A number of years ago, a regional center developed its own budgetary priority in collaboration with an advocacy organization that competed with ARCA's established budgetary priority for limited resources.
- In 2023, ARCA took an oppose unless amended position on a major piece of legislation. One regional center took a support position on that piece of legislation, which undermined ARCA's collective position on the bill.

**Date Adopted by ARCA Board of Directors: XXX**

**Department of Developmental Services  
UPDATE REGARDING SB 138 INITIATIVES  
January 2025**

This document provides the Master Plan for Developmental Services' Committee and its workgroups with an update on implementation of the 2023 Developmental Services Budget Trailer Bill, [Senate Bill 138](#) (Chapter 192, Statutes of 2023). That law has several topics. After each bolded topic below, there is a description of the law's requirements, and an update on the work being done to meet that requirement. This document intentionally is written to be easily understood. The actual law is the most accurate description of the law's requirements.

**1. Generic and Common Regional Center Services**

WIC [4435.2](#) tells the Department of Developmental Services (Department) to:

- a. Provide a definition of generic services, identify barriers to individuals using generic services, describe what regional centers do to help people get generic services, and identify ways to help more. This must be done by July 1, 2025 with community input.
- b. Review whether the new electronic records management system can track generic services that individuals use.
- c. Do an evaluation of the regional center services individuals most often use, and find out if they all are available across the state. Make recommendations for making their availability more equal.
- d. An update must be provided to the Legislature by January 10, 2025.

Update:

- The law says an individual has to try to use generic services before the regional center can provide funding for services from a regional center vendor or service provider. The difficulty in obtaining generic services can be a barrier to some individuals getting needed supports.
- The Department will provide a definition for generic services. Generally, generic services are services that are provided by another public agency that should be available to anyone who qualifies for them. Some examples are school, health, dental, housing, behavioral health, and in-home supportive services.
- The generic services and common regional center services identified in this work will be used to inform the design of the State's new electronic case management system.
- The evaluation of common regional center services will be done when some important changes have been made. For example, rate reform will make it easier to understand what kinds of services are being provided. The provider directory will give us information about service providers, their capacities, and geographic availability. The evaluation will take at least one year to complete because it depends on the availability of this information. The Department

will continue to provide updates as it becomes more clear when the evaluation will be completed.

- The Legislature meets quarterly with the Department, and received this update verbally at the most recent December 2024 meeting. The Legislature also is receiving a copy of this written document.

## **2. Race, Ethnicity, and Language Data Definitions**

WIC [4435.1\(b\)](#) tells the Department to:

- a. Create a standard definitions and individual choices for race, ethnicity and language so that our data can be more useful.
- b. All regional centers must use these new definitions and individual choices to record data beginning January 1, 2025.

### Update:

- After a lot of research, work with the community and other state departments, and a month-long public comment period, standard definitions and individual choices were established on July 1, 2024, for the following things:  
[Updated Requirements for Collecting Race, Ethnicity, and Language Data](#)
  - [Enclosure A - Race and Ethnicity](#)
  - [Enclosure B - Preferred Language](#)
  - [Enclosure C - Name, Pronouns, Sexual Orientation and Gender Identity](#)
  - [Enclosure D - Residence Codes](#)
  - [Enclosure E - Status Codes](#)
- Creating common data definitions is an important step to improve our understanding of individuals, and allowing individuals to identify and see themselves in the information that is collected.
- Over 400 regional center staff have been trained so they will be ready to use the new data categories beginning January 1, 2025. They also are training other staff at each regional center.
- These changes have been programmed into the regional center case management systems.
- These changes comply with recently updated federal reporting requirements, and with state laws.

## **3. Respite Assessment Template and Processes**

WIC [4435.1\(c\)](#) tells the Department to:

- a. Create one way for all regional centers to review an individual's need for respite services. This must be done by June 30, 2025.
- b. All regional centers must begin using the new way on January 1, 2026.

Update:

- Respite services are intended to give a break to people who take care of someone else.
- To provide respite services more consistently across the State, a tool is being created that will be used by all regional centers to figure out an individual and family's need for respite services.
- This tool also will be used to figure out how much day care and personal assistance an individual may need. These services are being added because they are similar to respite, although they have different purposes.
- A single tool used consistently across the State will make it easier for individuals and families to provide information, and understand the amount of their services.
- A draft version of the tool will be provided for the public to comment about in early 2025.
- The tool and instructions for how to use it should be finalized by June 30, 2025 so regional centers can be trained to use it beginning January 1, 2026.

**4. Intake Processes**

WIC [4435.1\(f\)](#) and WIC [4642\(a\)](#) tell the Department to:

- a. Create one way for individuals to find out if they are eligible for regional center services. This must be done by January 1, 2025.
- b. All regional centers must report how many individuals went through the process and how long it took them. This begins June 30, 2025 and must be done every three months.
- c. The new electronic records management system must be able to include certain information about these individuals.

Update:

- There are many different reasons people contact a regional center to find out if they are eligible for services. Today, each regional center has its own process for working with individuals and families to determine eligibility. This process is called intake and assessment.
- The intake and assessment requirements for Early Start services (ages 0-3) and Lanterman Act services (ages 3 and older) are different, so they need to be reviewed and planned separately.
- To make the experience of applying for regional center services easier to understand, the law requires one process that all regional centers will use. This will help make access to regional center services more consistent across the State, and provide a consistent experience for individuals and families.
- The law's deadline of January 1, 2025 will not be met. The intake and assessment process is complex, and it is important to get it right by working with everyone. The work on changes to the intake process is being done in stages.
- Beginning in 2025, community input will be requested in public meetings, focus groups, testing groups, and perhaps through surveys.

- This is expected to take at least one more year. A better idea of the timeline will be known after some of the community input in 2025.

## 5. Vendorization Procedures

WIC [4435.1\(e\)](#) tells the Department to:

- a. Create one way for new service providers to become vendors of the regional centers. This must be defined by June 30, 2025.
- b. All regional centers must use the new way beginning January 1, 2026. They must provide an updated list of their service providers every 3 months.

### Update:

- Having one way to become a vendor of a regional center can make it easier to get more service providers and make the approval process easier for them.
- Having more service providers available should help individuals get support sooner and have provide more choices in their services.
- Participant-Directed Social Recreation and Camp, and Coordinated Career Pathways, are new services. For these services, regional centers must approve new service providers in the same way. These requirements can serve as a model for approval of all vendors.
- The Department is working closely with regional centers and the Association of Regional Center Agencies (ARCA) to create one way that all regional centers will use.
- The statewide [Provider Directory](#) will be the single list of available service providers, after its development is complete. See the link for more information.

## 6. IPP Template and Procedures

WIC [4435.1\(d\)](#) tells the Department to:

- a. Create one way to make an individual program plan (IPP) and provide directions. This must be done by June 30, 2024.
- b. All regional centers must use the new IPP beginning January 1, 2025.
- c. The new electronic records management system must be able to include information from the IPP.

### Update:

- The Department started working on this in 2022 with the Regional Center Performance Measures workgroup. The workgroup recommended having one way to do an IPP and making it more person-centered.
- After a lot of community engagement, the new IPP template and an instruction guide was released on June 28, 2024:  
[Standardized Individual Program Plan Template and Procedures](#)
  - [Enclosure A – Individual Program Plan Template](#)
  - [Enclosure B – Individual Program Plan Agreement and Signature Form \(latest\)](#)



- [Enclosure C – Individual Program Plan Guide for Regional Centers \(latest\)](#)
- All regional centers were trained to use the new IPP during the Summer of 2024.
- A guide for adults, called Your Plan, was created. This optional guide can be used to prepare for an IPP meeting. It will be available in 11 languages, on the “Your Plan” section of this [webpage](#).
- Additional versions, called “Your Child’s Plan” for families with children ages 3-13 and “Your Youth’s Plan” for young adults ages 14-22 and their families are available on the same [webpage](#). These guides also are being translated into 11 languages.
- Family Resource Centers and community-based organizations were trained, and public meetings were held, in December 2024. Community education will continue into 2025.



San Diego Regional Center  
4355 Ruffin Road, San Diego, CA 92123  
858-576-2996 / www.sdrcc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

**SDICDSI FINANCE COMMITTEE MEETING**  
**Tuesday, February 11, 2025**  
**9449 Balboa Ave, Suite 300, and via Zoom**  
**11:00 a.m.**

**AGENDA**

1. Call to Order
2. Approval of Minutes (Attached – Action Item)  
-November 12, 2024, Finance Committee Meeting.
3. Approval of Purchase of Service Contracts (Attached – Action Item)  
-*See the attached listing of six (6) provider contracts.*
4. The Department of Developmental Services (DDS) Fiscal Compliance Audit Report of the San Diego Regional Center for Fiscal Years 2022-23 and 2023-2024, period of July 1, 2022, through June 30, 2024. (Attached – Information Item)
5. Fiscal Year 2024/2025 Purchase of Services (POS) Monthly Status Report. (Attached – Information Item)
6. Fiscal Year 2024/2025 Operations (OPS) Spending Plan Reports. (Attached – Information Item)
7. Old Business/New Business
8. Adjourn

**Committee Members:**

Virginia Bayer  
James Gonzalez  
Chris Hodge

Yasuko Mason  
Matt Storey (Chair)  
Wade Wilde (Community Representative)



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## **SDICDSI FINANCE COMMITTEE MEETING MINUTES**

**Tuesday, November 12, 2024**

**Suite 300 Conference Room and via Zoom**

**11:00 a.m.**

**Members Present:** Virginia Bayer, Dave Hadacek, Chris Hodge, Matt Storey, Wade Wilde Angela Yates

**Members Absent:** James Gonzalez

**Staff Present:** Mark Klaus, Miguel Larios, Dulce Morin, Brian Uribe, Robert Webb-Rex

The meeting of the Finance Committee of the San Diego-Imperial Counties Developmental Services, Inc. (SDICDSI) was called to order at 11:04 am by Matt Storey, Finance Committee Chair.

1. **Approval of Minutes:** The draft minutes of the October 08, 2024 Finance Committee meeting were approved.
2. **Approval of Purchase of Service Contracts:** The committee discussed approving the nine (9) purchase of services contracts presented to the Board.

M/S/C to recommend that the Board of Directors approve the nine (9) purchase of services contracts presented to the Board.

3. **Fiscal Year 2024/2025 Purchase of Services (POS) Monthly Status Report:** Dulce Morin reviewed the FY 2024/2025 POS spending plan. Actual POS expenditures through September 30, 2024 were \$184,410,481. Total projected POS expenditures are \$786,179,806. The projected POS surplus for FY 24/25 is 27,176,468.
4. **Fiscal Year 2024/2025 Operations Spending Plan Report:** Dulce Morin reviewed the FY 2024/2025 Operations (OPS) spending plan. The net total projected expenditures are \$123,249,038. Net OPS expenditures through September 30, 2024 were \$22,552,020. The FY 2024/2025 OPS spending plan is projected to be balanced at fiscal year-end.

5. **Adjourn:** There being no further business, the Finance Committee meeting was adjourned at 11:50 am.

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Matt Storey  
Finance Committee Chair

c: Dave Hadacek  
Mark Klaus



## Memorandum

DATE: February 4, 2025

TO: Members, Board of Directors

FROM: Dulce Morin, Director of Business Services

RE: The Department of Developmental Services (DDS) Fiscal Compliance Audit Report of the San Diego Regional Center for Fiscal Years 2022-23 and 2023-2024, period of July 1, 2022, through June 30, 2024.

Enclosed is the Department of Developmental Services (DDS) Fiscal Compliance Audit Report of the San Diego Regional Center for the two-year period of July 1, 2022, through June 30, 2024. The purpose of the audit is to ensure that San Diego Regional Center (SDRC) is compliant with the requirements outlined in the Lanterman Developmental Disabilities Services Act and Related Laws/Welfare and Institutions Code; the Home and Community-based Services (HCBS) Waiver for the Developmentally Disabled; California Code of Regulations (CCR), title 17, Federal Office of Management and Budget (OMB) Circulars A-122 and A-133; and, the contract with DDS.

The conclusion of the audit report states:

**“DDS has determined that, except for the item identified in the Finding and Recommendation section, the regional center was in compliance with applicable audit criteria. The costs claimed during the audit period were for program purposes and adequately supported.”**

**“From our review of two prior DDS audit findings, it has been determined that the regional center has taken appropriate corrective action to resolve both findings.”**

Findings and Recommendations of the audit report states:

**“SDRC agreed with the recommendation to reimburse DDS \$469.24 for the overstated claims. SDRC stated it will ensure all relevant staff will receive training on reviewing the Operational Indicator Reports.”**

If you have any questions about the audit report, please call me at (858) 576-2857.



PETE CERVINKA  
DIRECTOR

State of California—Health and Human Services Agency  
**Department of Developmental Services**  
1215 O Street, Sacramento, CA 95814  
[www.dds.ca.gov](http://www.dds.ca.gov)



GAVIN NEWSOM  
GOVERNOR

January 8, 2025

David Hadacek, Board President  
Sand Diego Regional Center  
4355 Ruffin Road, Suite 200  
San Diego CA, 92123

Dear David Hadacek:

The Department of Developmental Services' (DDS) Audit Section has completed the audit of the San Diego Regional Center (SDRC). The period of review was from July 1, 2022 through June 30, 2024, with follow-up as needed into prior and subsequent periods. The enclosed report discusses the areas reviewed along with the finding and recommendation. The audit report includes the response submitted by SDRC as Appendix B and DDS' reply on page 5.

If there is a disagreement with the audit finding, a written "Statement of Disputed Issues" may be filed with DDS' Audit Appeals Unit, pursuant to California Code of Regulations (CCR), Title 17, Section 50730, Request for Administrative Review (excerpt enclosed). The "Statement of Disputed Issues" must be filed and submitted within 30 days of receipt of this audit report to the address below:

Office of Legal Affairs  
Department of Developmental Services  
P.O. Box 944202  
Sacramento, CA 94299-9974

The cooperation of SDRC's staff in completing the audit is appreciated.

David Hadacek, Board President  
January 8, 2025  
Page two

If you have any questions regarding the audit report, please contact Edward Yan,  
Manager, Audit Section, at (916) 651-8207.

Sincerely,

*Ann Nakamura*

ANN NAKAMURA  
Branch Chief  
Research, Audit, and Evaluation Branch

Enclosure(s)

cc: Mark Klaus, Executive Director, SDRC  
Dulce Morin, Administrator – CFO, SDRC  
Bob Sands, Assistant Branch Chief, DHCS  
Carla Castañeda, Chief Deputy Director, DDS  
Dr. Michi A. Gates, Chief Deputy Director, DDS  
Hiren Patel, Chief Counsel, DDS  
Jim Knight, Deputy Director, DDS  
Ernie Cruz, Deputy Director, DDS  
Aaron Christian, Deputy Director, DDS  
Jacqueline Gaytan, Community Program Specialist, DDS  
Edward Yan, Manager, Audit Section DDS  
Luciah Ellen Nzima, Chief, RC Audit Unit, DDS  
Oscar Perez, Supervisor, RC Audit Unit, DDS



**California Code of Regulations**  
**Title 17, Division 2**  
**Chapter 1 - General Provisions**  
**Subchapter 7 - Fiscal Audit Appeals**  
**Article 2 - Administrative Review**

**§50730.** Request for Administrative Review.

a) An individual, entity, or organization which disagrees with any portion or aspect of an audit report issued by the Department or regional center may request an administrative review. The appellant's written request shall be submitted to the Department within 30 days after the receipt of the audit report. The request may be amended at any time during the 30-day period.

(b) If the appellant does not submit the written request within the 30-day period, the appeals review officer shall deny such request, and all audit exceptions or findings in the report shall be deemed final unless the appellant establishes good cause for late filing.

(c) The request shall be known as a "Statement of Disputed Issues." It shall be in writing, signed by the appellant or his/her authorized agent, and shall state the address of the appellant and of the agent, if any agent has been designated. An appellant shall specify the name and address of the individual authorized on behalf of the appellant to receive any and all documents, including the final decision of the Director, relating to proceedings conducted pursuant to this subchapter. The Statement of Disputed Issues need not be formal, but it shall be both complete and specific as to each audit exception or finding being protested. In addition, it shall set forth all of the appellant's contentions as to those exceptions or findings, and the estimated dollar amount of each exception or finding being appealed.

(d) If the appeals review officer determines that a Statement of Disputed Issues fails to state the grounds upon which objections to the audit report are based, with sufficient completeness and specificity for full resolution of the issues presented, he/she shall notify the appellant, in writing, that it does not comply with the requirements of this subchapter.

(e) The appellant has 15 days after the date of mailing of such notice within which to file an amended Statement of Disputed Issues. If the appellant does not amend his/her appeal to correct the stated deficiencies within the time permitted, all audit exceptions or findings affected shall be dismissed from the appeal, unless good cause is shown for the noncompliance.

(f) The appellant shall attach to the Statement of Disputed Issues all documents which he/she intends to introduce into evidence in support of stated contentions. An appellant that is unable to locate, prepare, or compile such documents within the appeal period specified in Subsection (a) above, shall include a statement to this effect in the Statement of Disputed Issues. The appellant shall have an additional 30 days after the expiration of the initial 30-day period in which to submit the documents. Documents that are not submitted within this period shall not be accepted into evidence at any stage of the appeal process unless good cause is shown for the failure to present the documents within the prescribed period.



PETE CERVINKA  
DIRECTOR

State of California—Health and Human Services Agency  
**Department of Developmental Services**  
1215 O Street, Sacramento, CA 95814  
[www.dds.ca.gov](http://www.dds.ca.gov)



GAVIN NEWSOM  
GOVERNOR

# AUDIT OF THE SAN DIEGO REGIONAL CENTER FOR FISCAL YEARS 2022-23 AND 2023-24

January 8, 2025

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## DDS TEAM

Ann Nakamura, Branch Chief, Research, Audit, and Evaluation Branch  
Edward Yan, Manager, Audit Section  
Luciah Ellen Nzima, Chief, Regional Center Audit Unit  
Oscar Perez, Supervisor, Regional Center Audit Unit  
Audit Staff: Carlos Whylesmenchaca, Chanta Ham and Diosdado Agustin

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## **RESTRICTED USE**

This audit report is solely for the information and use of DDS, CMS, Department of Health Care Services, and the regional center. This restriction does not limit distribution of this audit report, which is a matter of public record.

## **EXECUTIVE SUMMARY**

The Department of Developmental Services (DDS) conducted a fiscal compliance audit of San Diego Regional Center to assess compliance with the requirements set forth in the Lanterman Developmental Disabilities Services Act and Related Laws/Welfare and Institutions (W&I) Code; the Home and Community-based Services (HCBS) Waiver for the Developmentally Disabled; California Code of Regulations (CCR), Title 17; Federal Office of Management and Budget (OMB) Circulars A-122 and A-133; and the contract with DDS. Overall, the audit indicated that the regional center maintains accounting records and supporting documentation for transactions in an organized manner.

The audit period was July 1, 2022, through June 30, 2024, with follow-up, as needed, into prior and subsequent periods. This report identified an area where the regional center's administrative and operational controls could be strengthened, but the finding was not of a nature that would indicate systemic issues or constitute major concerns regarding the regional center's operations.

A follow-up review was performed to determine whether the regional center has taken corrective action to resolve the findings identified in the prior DDS audit report. The results of the follow-up can be found in the Conclusions section.

### **Finding that has been addressed and corrected:**

Finding 1: Overstated Claims - SDRC overpaid four vendors due to duplicate payments or overlapping authorizations totaling \$469.24.

SDRC provided a check to DDS for the overpayment totaling \$469.24. Therefore, this issue is considered resolved.

## **BACKGROUND**

DDS San Diego-Imperial Counties Developmental Services, Inc. entered State Contract HD199017, effective July 1, 2019, through June 30, 2026. This contract specifies that San Diego-Imperial Counties Developmental Services, Inc. will operate an agency known as the San Diego Regional Center to provide services to individuals with intellectual and developmental disabilities (IDD) and their families. The contract is funded by state and federal funds that are dependent upon the regional center performing certain tasks, providing services to eligible consumers, and submitting billings to DDS.

This audit was conducted from August 19, 2024, through September 19, 2024, by the Audit Section of DDS.

## **AUTHORITY**

The audit was conducted under the authority of the W&I Code, Section 4780.5 and the State Contract between DDS and the regional center.

## **CRITERIA**

The following criteria were used for this audit:

- W&I Code,
- Approved Application for the HCBS Waiver for the Developmentally Disabled,
- CCR, Title 17,
- OMB Circulars A-122 and A-133, and
- The State Contract between DDS and the regional center, effective July 1, 2019.

## **VIEWS OF RESPONSIBLE OFFICIALS**

DDS issued the draft audit report on November 21, 2024. The finding in the draft audit report were discussed at a formal exit conference on November 26, 2024. The views of responsible officials are included in this final audit report.

## **CONCLUSIONS**

Based upon the audit procedures performed, DDS has determined that except for the item identified in the Finding and Recommendation section, the regional center was in compliance with applicable audit criteria.

The costs claimed during the audit period were for program purposes and adequately supported.

From our review of two prior DDS audit findings, it has been determined that the regional center has taken appropriate corrective action to resolve both findings.

## **FINDING AND RECOMMENDATION**

**Finding that has been addressed and corrected:**

**Finding 1: Overstated Claims**

The review of the Operational Indicator Reports revealed five instances in which SDRC overpaid four vendors a total of \$469.24 due to duplicate payments or overlapping authorizations. SDRC indicated this was an error on its part, as staff did not identify the erroneous payments during the payment process. (See Attachment A)

SDRC provided a check to DDS for the overpayment totaling \$469.24. Therefore, this issue is resolved.

CCR, Title 17, Section 57300(c)(2) states:

“(c) Regional Centers shall not reimburse vendors:

(2) For services in an amount greater than the rate established pursuant to these regulations.”

**Recommendation:**

SDRC should ensure its staff is reviewing all Operational Indicator Reports and are promptly correcting all erroneous payment that may have occurred while conducting business with its vendors.



## EVALUATION OF RESPONSE

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As part of the audit report process, the regional center was provided with a draft audit report and requested to provide a response to the finding. Its response is provided as Appendix B. DDS' Audit Section has evaluated the response and will confirm the appropriate corrective actions have been taken during the next scheduled audit, unless otherwise described.

**Finding 1: Overstated Claims**

SDRC agreed with the recommendation to reimburse DDS \$469.24 for the overstated claims. SDRC stated it will ensure all relevant staff will receive training on reviewing the Operational Indicator Reports.

**San Diego Regional Center  
Overstated Claim Due to Duplicate Payments  
Fiscal Years 2022-23 and 2023-24**

No.	Vendor Number	Vendor Name	Authorization Number	Payment Period	Claim Amount	Correct Amount	Overstated Claims	Outstanding Amount
1	P97138	Quality Care Pharmacy	22802338	Mar-22	\$189.70	\$94.85	\$94.85	\$0.00
2			22799589	Apr-22	\$179.54	\$89.77	\$89.77	\$0.00
3	PY1759	Marquez, Janalee	22732708	Apr-22	\$341.28	\$170.64	\$170.64	\$0.00
4	HQ0341	Community Interface Svcs	22762461	Aug-21	\$91.76	\$45.88	\$45.88	\$0.00
5	PY0858	CIS	22668380	Aug-21	\$68.10	\$0.00	\$68.10	\$0.00
<b>Total Overstated Claim Due to Duplicate Payments</b>							<b>\$469.24</b>	<b>\$0.00</b>

## **APPENDIX A**

### **SCOPE, OBJECTIVES, AND METHODOLOGY**

DDS is responsible, under the W&I Code, for ensuring that persons with intellectual and developmental disabilities receive the services and supports they need to lead more independent, productive, and integrated lives. To secure these services and supports, DDS contracts with 21 private, nonprofit community agencies/corporations that provide fixed points of contact in the community for serving eligible individuals and their families in California. These fixed points of contact are referred to as regional centers. The regional centers are responsible under State law to help ensure that such persons receive access to the programs and services that are best suited to them throughout their lifetime.

DDS also is responsible for providing assurance to the federal Department of Health and Human Services, Centers for Medicare, and Medicaid Services (CMS), that services billed under California's HCBS Waiver program are provided and that criteria set forth for receiving funds have been met. As part of providing this assurance, the Audit Section conducts fiscal compliance audits of each regional center no less than every two years and completes follow-up reviews in alternate years.

In addition to the fiscal compliance audit, each regional center also is monitored by the DDS Federal Programs Operations Section to assess overall programmatic compliance with HCBS Waiver requirements. The HCBS Waiver compliance monitoring review has its own criteria and processes. These audits and program reviews are an essential part of an overall DDS monitoring system that provides information on the regional centers' fiscal, administrative, and program operations.

This audit was conducted as part of the overall DDS monitoring system that provides information on the regional centers' fiscal, administrative, and program operations. The objectives of this audit were:

- To determine compliance with the W&I Code,
- To determine compliance with the provisions of the HCBS Waiver Program for the Developmentally Disabled,
- To determine compliance with CCR, Title 17 regulations,
- To determine compliance with OMB Circulars A-122 and A-133, and
- To determine that costs claimed were in compliance with the provisions of the State Contract between DDS and the regional center.

The audit was conducted in accordance with the Generally Accepted Government Auditing Standards issued by the Comptroller General of the United States. However, the procedures do not constitute an audit of the regional center's financial statements. DDS limited the scope to planning and performing audit procedures necessary to obtain reasonable assurance that the regional center was in compliance with the objectives identified above.

DDS' review of the regional center's internal control structure was conducted to gain an understanding of the transaction flow and the policies and procedures, as necessary, to develop appropriate auditing procedures.

DDS reviewed available annual audit report(s) that were conducted by an independent CPA firm. This review was performed to determine the impact, if any, upon the DDS audit and, as necessary, develop appropriate audit procedures.

The audit procedures performed included the following:

**I. Purchase of Service**

DDS selected a sample of Purchase of Service (POS) claims billed to DDS. The sample included consumer services and vendor rates. The sample also included consumers who were eligible for the HCBS Waiver Program. For POS claims, the following procedures were performed:

- DDS tested the sample items to determine if the payments made to service providers were properly claimed and could be supported by appropriate documentation.
- DDS selected a sample of invoices for service providers with daily and hourly rates, standard monthly rates, and mileage rates to determine if supporting attendance documentation was maintained by the regional center. The rates charged for the services provided to individual consumers were reviewed to ensure compliance with the provision of the W&I Code; the HCBS Waiver for the Developmentally Disabled; CCR, Title 17, OMB Circulars A-122 and A-133; and the State Contract between DDS and the regional center.
- If applicable to this audit, DDS selected a sample of individual Consumer Trust Accounts to determine if there were any unusual activities and whether any account balances exceeded \$2,000, as prohibited by the Social Security Administration. In addition, DDS determined if any retroactive Social Security benefit payments received exceeded the \$2,000 resource limit for longer than nine months. DDS also reviewed these accounts to ensure that the interest earnings were distributed quarterly, personal and incidental funds were paid before the 10th of each month, and proper documentation for expenditures was maintained.
- If applicable to this audit, the Client Trust Holding Account, an account used to hold unidentified consumer trust funds, was tested to determine whether funds received were properly identified to a consumer or returned to the Social Security Administration in a timely manner. An interview with the regional center staff revealed that the regional center has procedures in place to determine the correct recipient of unidentified consumer trust

funds. If the correct recipient cannot be determined, the funds are returned to the Social Security Administration or other sources in a timely manner.

- If applicable to this audit, DDS selected a sample of Uniform Fiscal Systems (UFS) reconciliations to determine if any accounts were out of balance or if there were any outstanding items that were not reconciled.
- DDS analyzed all bank accounts to determine whether DDS had signatory authority, as required by the State Contract with DDS.
- DDS selected a sample of bank reconciliations for Operations (OPS) accounts and Consumer Trust bank accounts to determine if the reconciliations were properly completed on a monthly basis.

## **II. Regional Center Operations**

DDS selected a sample of OPS claims billed to DDS to determine compliance with the State Contract. The sample included various expenditures claimed for administration that were reviewed to assure that accounting staff properly input data, transactions were recorded on a timely basis, and expenditures charged to various operating areas were valid and reasonable. The following procedures were performed:

- A sample of the personnel files, timesheets, payroll ledgers, and other support documents were selected to determine if there were any overpayments or errors in the payroll or the payroll deductions.
- A sample of OPS expenses, including, but not limited to, purchases of office supplies, consultant contracts, insurance expenses, and lease agreements were tested to determine compliance with CCR, Title 17, and the State Contract.
- A sample of equipment was selected and physically inspected to determine compliance with requirements of the State Contract.
- DDS reviewed the regional center's policies and procedures for compliance with the DDS Conflict of Interest regulations, and DDS selected a sample of personnel files to determine if the policies and procedures were followed.

### **III. Targeted Case Management (TCM) and Regional Center Rate Study**

The TCM Rate Study determines the DDS rate of reimbursement from the federal government. The following procedures were performed upon the study:

- DDS examined the two TCM Rate Studies submitted to DDS during the audit period and traced the reported information to source documents.
- A review of the recent Case Management Time Study (required to be submitted every three years) is conducted if the study was not reviewed during the prior audit. DDS selected a sample of the Case Management Time Study Forms (DS 1916) for examination and reconciled them to the corresponding payroll timesheets to ensure that the forms were properly completed and supported.

### **IV. Service Coordinator Caseload Survey**

Under the W&I Code, Section 4640.6(e), regional centers are required to provide service coordinator caseload data to DDS. The following average service coordinator-to-consumer ratios apply per W&I Code Section 4640.6(c)(1)(2)(3)(A)(B)(C):

- “(c) Contracts between the department and regional centers shall require regional centers to have service coordinator-to-consumer ratios, as follows:
  - (1) An average service coordinator-to-consumer ratio of 1 to 62 for all consumers who have not moved from the developmental centers to the community since April 14, 1993. In no case shall a service coordinator for these consumers have an assigned caseload in excess of 79 consumers for more than 60 days.
  - (2) An average service coordinator-to-consumer ratio of 1 to 45 for all consumers who have moved from a developmental center to the community since April 14, 1993. In no case shall a service coordinator for these consumers have an assigned caseload in excess of 59 consumers for more than 60 days.
  - (3) The following coordinator-to-consumer ratios shall apply:
    - (A) All consumers enrolled in the Home and Community-based Services Waiver program for persons with developmental disabilities, an average service coordinator-to-consumer ratio of 1 to 62.

- (B) All consumers who have moved from a developmental center to the community since April 14, 1993, and have lived continuously in the community for at least 12 months, an average service coordinator-to-consumer ratio of 1 to 62.
  - (C) All consumers who have not moved from the developmental centers to the community since April 14, 1993, and who are not described in subparagraph (A), an average service coordinator-to-consumer ratio of 1 to 66.
- (4) Notwithstanding paragraphs (1) to (3), inclusive, an average service coordinator-to-consumer ratio of 1 to 40 for all consumers five years of age and younger.
  - (5) (A) Notwithstanding paragraphs (1) to (3), inclusive, enhanced service coordination, including a service coordinator-to-consumer ratio of 1 to 40, shall be available to consumers identified as having low or no purchase-of-service expenditures, as identified in the annual Budget Act.
  - (6) (A) Notwithstanding paragraphs (1) to (3), inclusive, an average service coordinator-to-consumer ratio of 1 to 25 for all consumers with complex needs.
  - (7) For purposes of paragraph (3), service coordinators may have a mixed caseload of consumers three years of age and younger, consumers enrolled in the Home and Community-based Services Waiver program for persons with developmental disabilities, and other consumers if the overall average caseload is weighted proportionately to ensure that overall regional center average service coordinator-to-consumer ratios as specified in paragraph (3) are met. For purposes of paragraph (3), in no case shall a service coordinator have an assigned caseload in excess of 84 for more than 60 days.”

DDS also reviewed the Service Coordinator Caseload Survey methodology used in calculating the caseload ratios to determine reasonableness and that supporting documentation is maintained to support the survey and the ratios as required by W&I Code, Section 4640.6(e).

**V. Early Intervention Program (EIP; Part C Funding)**

For the EIP, there are several sections contained in the Early Start Plan. However, only the Part C section was applicable for this review.

## **VI. Parental Fee Program (PFP)**

The PFP was created for the purpose of prescribing financial responsibility to parents of children under the age of 18 years who are receiving 24-hour, out-of-home care services through a regional center or who are residents of a state hospital or on leave from a state hospital. Parents shall be required to pay a fee depending upon their ability to pay, but not to exceed (1) the cost of caring for a child without DD at home, as determined by the Director of DDS, or (2) the cost of services provided, whichever is less. To determine compliance with the W&I Code Section 4784, DDS requested a list of PFP assessments and verified the following:

- Identified all children with DD who are receiving the following services:
  - (a) All 24-hour, out-of-home community care received through a regional center for children under the age of 18 years;
  - (b) 24-hour care for such minor children in state hospitals;
  - (c) provided, however, that no ability to pay determination may be made for services required by state or federal law, or both, to be provided to children without charge to their parents.
- Provided DDS with a listing of new placements, terminated cases, and client deaths for those clients. Such listings must be provided not later than the 20th day of the month following the month of such occurrence.
- Informed parents of children who will be receiving services that DDS is required to determine parents' ability to pay and to assess, bill, and collect parental fees.
- Provided parents a package containing an informational letter, a Family Financial Statement (FFS), and a return envelope within 10 working days after placement of a minor child.
- Provided DDS a copy of each informational letter given or sent to parents, indicating the addressee and the date given or mailed.

## **VII. Procurement**

The Request for Proposal (RFP) process was implemented so that regional centers outline the vendor selection process when using the RFP process to address consumer service needs. As of January 1, 2011, DDS requires regional centers to document their contracting practices, as well as how particular vendors are selected to provide consumer services. By implementing a procurement process, regional centers will ensure that the most cost-effective



service providers, amongst comparable service providers, are selected, as required by the Lanterman Act and the State Contract. To determine whether the regional center implemented the required RFP process, DDS performed the following procedures during the audit review:

- Reviewed the regional center's contracting process to ensure the existence of a Board-approved procurement policy and to verify that the RFP process ensures competitive bidding, as required by Article II of the State Contract, as amended.
- Reviewed the RFP contracting policy to determine whether the protocols in place included applicable dollar thresholds and comply with Article II of the State Contract, as amended.
- Reviewed the RFP notification process to verify that it is open to the public and clearly communicated to all vendors. All submitted proposals are evaluated by a team of individuals to determine whether proposals are properly documented, recorded, and authorized by appropriate officials at the regional center. The process was reviewed to ensure that the vendor selection process is transparent and impartial and avoids the appearance of favoritism. Additionally, DDS verified that supporting documentation is retained for the selection process and, in instances where a vendor with a higher bid is selected, written documentation is retained as justification for such a selection.

DDS performed the following procedures to determine compliance with the State Contract:

- Selected a sample of Operations, Community Placement Plan (CPP), and negotiated POS contracts subject to competitive bidding to ensure the regional center notified the vendor community and the public of contracting opportunities available.
- Reviewed the contracts to ensure that the regional center has adequate and detailed documentation for the selection and evaluation process of vendor proposals and written justification for final vendor selection decisions and that those contracts were properly signed and executed by both parties to the contract.

In addition, DDS performed the following procedures:

- To determine compliance with the W&I Code, Section 4625.5: Reviewed to verify that the regional center has a written policy requiring the Board to review and approve any of its contracts of two hundred fifty thousand dollars (\$250,000) or more before entering into a contract with the vendor.

- Reviewed the regional center Board-approved Operations, Start-Up, and POS vendor contracts of \$250,000 or more, to verify that the inclusion of a provision for fair and equitable recoupment of funds for vendors that cease to provide services to consumers; verified that the funds provided were specifically used to establish new or additional services to consumers, the usage of funds is of direct benefit to consumers, and the contracts are supported with sufficiently detailed and measurable performance expectations and results.

The process above was conducted in order to assess the current RFP process and Board approval for contracts of \$250,000 or more, as well as to determine whether the process in place satisfies the W&I Code and State Contract requirements.

### **VIII. Statewide/Regional Center Median Rates**

The Statewide and Regional Center Median Rates were implemented on July 1, 2008, and amended on December 15, 2011, July 1, 2016, and April 1, 2022. Regional centers may not negotiate rates higher than the set median rates for services. Despite the median rate requirement, rate increases can be obtained from DDS under health and safety exemptions where regional centers demonstrate the exemption is necessary for the health and safety of the consumers.

To determine compliance with the Lanterman Act, DDS performed the following procedures during the audit review:

- Reviewed sample vendor files to determine whether the regional center is using appropriately vendorized service providers and correct service codes, and is paying authorized contract rates and complying with the median rate requirements of W&I Code Section 4691.9.
- Reviewed vendor contracts to verify that the regional center is reimbursing vendors using authorized contract median rates and verified that rates paid represented the lower of the statewide or regional center median rate set after June 30, 2008. Additionally, DDS verified that providers vendorized before June 30, 2008, did not receive any unauthorized rate increases, except in situations where required by regulation, or health and safety exemptions were granted by DDS.
- Reviewed vendor contracts to verify that the regional center did not negotiate rates with new service providers for services which are higher than the regional center's median rate for the same service code and unit of service, or the statewide median rate for the same service code and unit of service, whichever is lower. DDS also verified that units of service designations conformed with existing regional center designations or, if

none exists, checked that units of service conformed to a designation used to calculate the statewide median rate for the same service code.

**IX. Other Sources of Funding from DDS**

Regional centers may receive other sources of funding from DDS. DDS performed sample tests on identified sources of funds from DDS to ensure the regional center's accounting staff were inputting data properly, and that transactions were properly recorded and claimed. In addition, tests were performed to determine if the expenditures were reasonable and supported by documentation. The sources of funding from DDS identified in this audit may include:

- CPP;
- Part C – Early Start Program;
- Family Resource Center;
- Foster Grandparent (FGP);
- Senior Companion (SC);
- Self Determination;
- Mental Health Services Act;
- HCBS Compliance;
- Language Access and Cultural Competency (LACC) Program; and
- Enhanced Community Integration for Children and Adolescents.

**X. Follow-up Review on Prior DDS Audit Finding(s)**

As an essential part of the overall DDS monitoring system, a follow-up review of prior DDS audit finding(s) was conducted, if applicable. DDS identified prior audit finding(s) and reviewed supporting documentation to determine the degree of completeness of implementation of corrective actions.

**APPENDIX B**

**SAN DIEGO REGIONAL CENTER'S  
RESPONSE  
TO THE AUDIT FINDING**



San Diego Regional Center  
4355 Ruffin Road, San Diego, CA 92123  
858-576-2996 / www.sdrc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

December 11, 2024

Ed Yan, Manager  
Audit Section  
Department of Developmental Services  
1215 O Street, MS 9-20  
Sacramento, California 95814

Dear Mr. Yan:

The following is the San Diego Regional Center (SDRC) response to the findings and recommendations of the Department of Developmental Services (DDS) Draft Fiscal Audit report for Fiscal Years 2022-2023 and 2023-2024.

Thank you for the opportunity to include the San Diego Regional Center response in the final audit report.

**Finding 1: Overstated Claims**

**Recommendation:**

SDRC must reimburse DDS for the overstated claims totaling \$469.24. In addition, SDRC should also ensure that staff reviews all Operational Indicator Reports and promptly correct all erroneous payments that may have occurred while conducting business with its vendors.

**SDRC Response to Finding 1:**

SDRC concurs with the DDS recommendation and will reimburse DDS \$469.24 (check#153413). In addition, SDRC will ensure that all relevant staff receive comprehensive training on reviewing and validating Operational Indicator Reports. SDRC will focus on promptly identifying and addressing payment discrepancies.

Ed Yan  
Audit Response Letter  
December 11, 2024  
Page 2 of 2

Sincerely,

A handwritten signature in black ink, appearing to read "Dulce Morin". The signature is fluid and cursive, with a large initial "D" and "M".

/s/ Dulce Morin  
Director of Business Services  
San Diego-Imperial Counties Developmental Services, Inc.

c: David Hadacek, Chair, SD-ICDSI Board of Directors  
Mark Klaus, Executive Director, SD-ICDSI  
Ellen Nzima, Chief, Regional Center Audit Unit  
Oscar Perez, Supervisor, Regional Center Audit Unit

**San Diego Regional Center  
Fiscal Status Report Summary  
For the Six Month Period Ending December 31, 2024**

	<b>FY 2024/2025 A-1 Allocation &amp; ICF SPA</b>	<b>Projected FY 2024/2025 Expenses</b>	<b>Surplus (Deficit)</b>
<b><u>Purchase of Services (POS)*</u></b>			
Client Services	\$ 815,356,274 *	\$ 786,485,903	\$ 28,870,371
Community Placement Plan	100,000	100,000	-
Total POS	<u>815,456,274</u>	<u>786,585,903</u>	<u>28,870,371</u>
<b><u>Operations Spending Plan</u></b>			
A- Preliminary Contract	\$ 70,471,970		
A-1 Contract Amendment	52,777,068		
Total Operations Allocation	<u>\$ 123,249,038</u>	<u>123,249,038</u>	<u>-</u>
<b>Total Allocation as of the A-1 &amp; Intermediate Care Facility- State Plan Amendment (ICF SPA)</b>	<b><u>\$ 938,705,312</u></b>	<b><u>\$ 909,834,941</u></b>	<b><u>\$ 28,870,371</u></b>
<b><u>Purchase of Service Allocation &amp; ICF SPA Reconciliation</u></b>			
A-Preliminary Contract	\$ 604,283,502		
A-1 Contract Amendment	\$ 201,072,772		
add: ICF SPA Reimbursement	<u>10,000,000</u>		
Total Purchase of Service Allocation	<u>\$ 815,356,274</u> *		

**San Diego Regional Center  
Purchase of Service Monthly Status Report  
For the Six Month Period Ending December 31, 2024**

	<b>A FY2024/2025 A-1 Allocation</b>	<b>B FY2024/2025 Expenditures 12/31/2024</b>	<b>C Projected Expenditures Remaining</b>	<b>B+C Total Projected Expenditures FY 2024/2025</b>	<b>A-(B+C) + / -</b>
<b>Client Services</b>					
Out of Home	\$ 256,215,040	\$ 123,950,071	\$ 128,054,186	\$ 252,004,257	\$ 4,210,783
Day Activity	168,288,854	82,378,216	83,276,556	165,654,772	2,634,082
Habilitation	20,243,727	7,632,977	8,590,040	16,223,017	4,020,710
Medical Services	14,290,831	5,683,864	6,557,182	12,241,046	2,049,785
Non-Med Services	48,732,557	22,401,300	24,329,974	46,731,274	2,001,283
Support Services	93,245,556	43,518,998	45,092,804	88,611,802	4,633,754
Early Childhood	34,523,464	15,298,590	16,548,008	31,846,598	2,676,866
Transportation	33,572,099	14,258,624	14,888,726	29,147,350	4,424,749
Other	146,244,146	70,349,134	73,676,653	144,025,787	2,218,359
<b>Total Purchase of Services (POS)</b>	815,356,274	385,471,774	401,014,129	786,485,903	28,870,371
less: ICF/SPA POS Reimbursements	(10,000,000)	(6,623,088)	(3,376,912)	(10,000,000)	-
<b>Net Balance (A-1)</b>	<u>\$ 805,356,274</u>	<u>\$ 378,848,686</u>	<u>\$ 397,637,217</u>	<u>\$ 776,485,903</u>	<u>\$ 28,870,371</u>
<b>CPP</b>					
<b>CPP POS Expenses</b>	\$100,000	\$79,616	\$20,384	\$100,000	\$ -
<b>Total CPP (A-1)</b>	<u>\$100,000</u>	<u>\$79,616</u>	<u>\$20,384</u>	<u>\$100,000</u>	<u>\$ -</u>



**San Diego Regional Center**  
**Fiscal Year 2024/2025 Operations Spending Plan**  
**For the Six Month Period Ending December 31, 2024**

	<u>Spending Plan</u>	<u>Expended YTD (12/31/2024)</u>	<u>Projected Expenditures Remaining</u>	<u>Total Projected Expenditures</u>
<b>Personnel</b>				
Salaries	\$ 73,149,523	\$ 32,419,564	40,729,959	\$ 73,149,523
Fringe Benefits	26,932,333	8,252,246	18,680,087	26,932,333
Temporaries	611,229	239,604	371,625	611,229
Subtotal Personnel	<u>100,693,085</u>	<u>40,911,414</u>	<u>59,781,671</u>	<u>100,693,085</u>
<b>General Expense</b>				
General Exp, Supplies & Tech	4,067,448	593,642	3,473,806	4,067,448
General Maint. & Construction	2,704,713	75,147	2,629,566	2,704,713
Equipment Purchases	985,031	1,884	983,147	985,031
Information Technology	1,275,259	715,707	559,552	1,275,259
Building Services	734,319	449,448	284,871	734,319
Postage	196,913	196,793	120	196,913
Utilities	1,902,596	621,360	1,281,236	1,902,596
Printing	28,307	0	28,307	28,307
Accounting/Audit/Tax Fees	60,000	0	60,000	60,000
LOC Expenses			0	0
Tuition Reimbursement	610,000	0	610,000	610,000
Policy/Projects/Miscellaneous	1,940,435	280,426	1,660,009	1,940,435
Subtotal General Expense	<u>14,505,022</u>	<u>2,934,407</u>	<u>11,570,615</u>	<u>14,505,022</u>
<b>Rent</b>	5,853,510	3,128,578	2,724,932	5,853,510
<b>Contracts</b>				
Consultant Services	437,810	254,922	182,888	437,810
Equipment Rental	279,491	103,750	175,741	279,491
Subtotal	<u>717,301</u>	<u>358,672</u>	<u>358,629</u>	<u>717,301</u>
<b>Other Expenses</b>				
ARCA Expenses/Dues	158,824	6,890	151,934	158,824
Legal	629,379	282,233	347,146	629,379
Insurance	1,099,946	641,045	458,901	1,099,946
Travel	580,274	252,534	327,740	580,274
Board of Directors	82,006	46,518	35,488	82,006
Staff Training	38,176	13,686	24,490	38,176
Community Training	25,000		25,000	25,000
Public Information	25,000		25,000	25,000
Subtotal	<u>2,638,605</u>	<u>1,242,906</u>	<u>1,395,699</u>	<u>2,638,605</u>
<b>Total Operating Expenses</b>	124,407,522	48,575,977	75,831,545	124,407,522
<b>Interest/Other Revenues</b>	(1,057,332)	(831,130)	(226,202)	(1,057,332)
<b>ICF SPA Service Fees Earned</b>	(101,152)	(99,346)	(1,806)	(101,152)
<b>Net Operating Expenses</b>	<u>123,249,038</u>	<u>\$ 47,645,501</u>	<u>\$ 75,603,537</u>	123,249,038
<b>A-1 OPS Allocation</b>				<u>\$ 123,249,038</u>
<b>Projected FY2024/2025 Spending Plan Surplus/(Deficit)</b>				<u>\$ -</u>

**San Diego Regional Center  
Operations Spending Plan Comparison Report  
For the Period Ending December 31, 2024**

	<b>YEAR-TO-DATE ACTUAL EXPENDITURES COMPARISON</b>		<b>FISCAL YEAR PROJECTED EXPENDITURES COMPARISON</b>	
	<b>Current Year Expenses through (12/31/2024)</b>	<b>Prior Year Expenses through (12/31/2023)</b>	<b>FY2024/2025 Total Projected Expenses</b>	<b>FY2023/2024 Total Expenses (estimated)</b>
<b>Personnel</b>				
Salaries	\$ 32,419,564	29,662,244	\$ 73,149,523	\$ 63,335,579
Fringe Benefits	8,252,246	6,933,035	26,932,333	22,167,453
Temporaries	239,604	246,699	611,229	576,000
Subtotal Personnel	<u>40,911,414</u>	<u>36,841,978</u>	<u>100,693,085</u>	<u>86,079,032</u>
<b>General Expense</b>				
General Exp, Supplies & Tech	593,642	2,235,840	4,767,448	4,600,000
General Maint. & Construction	75,147	842,841	2,704,713	2,000,000
Equipment Purchases	1,884	947,316	985,031	1,551,103
Information Technology	715,707	406,925	775,259	1,447,379
Building Services	449,448		734,319	600,000
Postage	196,793	109,652	196,913	206,000
Utilities	621,360	113,388	1,902,596	230,000
Printing	-	22,161	28,307	54,500
Accounting/Audit/Tax Fees	-	5,720	60,000	76,300
Tuition Reimbursement				
LOC Expenses	-		610,000	
Policy/Projects/Miscellaneous	280,426	230,140	1,940,435	1,303,996
Subtotal General Expense	<u>2,934,407</u>	<u>4,913,983</u>	<u>14,705,022</u>	<u>13,459,670</u>
<b>Rent</b>	3,128,578	3,515,921	5,853,510	7,595,500
<b>Contracts</b>				
Consultant Services	254,922	70,969	237,810	1,426,000
Equipment Rental	103,750	145,143	279,491	463,250
Subtotal	<u>358,672</u>	<u>216,112</u>	<u>517,301</u>	<u>2,014,250</u>
<b>Other Expenses</b>				
ARCA Expenses/Dues	6,890		158,824	160,000
Legal	282,233	253,772	629,379	747,487
Insurance	641,045	741,142	1,099,946	993,570
Travel	252,534	231,684	580,274	674,500
Board of Directors	46,518	29,626	82,006	85,000
Staff Training	13,686	1,399	38,175	38,000
Community Training			25,000	
Public Information		75	25,000	25,000
Subtotal	<u>1,242,906</u>	<u>1,257,698</u>	<u>2,638,604</u>	<u>2,748,557</u>
<b>Total Operating Expenses</b>	48,575,977	46,745,692	124,407,522	111,897,009
<b>Interest/Other Revenues</b>	(831,130)	(842,145)	(1,057,332)	(1,774,268)
<b>ICF SPA Service Fees Earned</b>	(99,346)	(91,505)	(101,152)	(184,776)
<b>Net Operating Expenses</b>	<u>\$ 47,645,501</u>	<u>45,812,042</u>	<u>\$ 123,249,038</u>	<u>\$ 109,937,965</u>



San Diego Regional Center  
4355 Ruffin Road, San Diego, CA 92123  
858-576-2996 / [www.sdrc.org](http://www.sdrc.org)

Serving individuals with developmental disabilities in San Diego and Imperial Counties

## Memorandum

DATE: February 4, 2025  
TO: Board of Directors  
FROM: Dulce Morin  
RE: Contracts for Board Review

The February 11, 2025, Board meeting agenda includes the approval of contracts with the following six (6) service providers.

### New or Revised Contracts

PY3647	Bianca Sanchez
HQ2140	Connections for Adults Living Independently, Inc.
HQ2146	Hilltop Home Care Solutions DBA Hilltop Home Care Center II
HQ2141	Karing With Pride, Inc.
HQ2148	Leo Care LLC DBA Harrison Home
HQ2145	Rose L. Sams DBA Andrea's Place ARF LLC

The contracts for Board review are posted on the San Diego Regional Center website in their entirety, including the contract summaries. To access the contracts, log on to the San Diego Regional Center website at <http://sdrc.org/board>, and scroll to the bottom of the page to view the current contracts.

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name (name facility or program):</b>	Bianca Sanchez 4040 Citradora Dr. Spring Valley, CA 91977
<b>2</b>	<b>Vendor #:</b>	PY3647
<b>3</b>	<b>Type of Program:</b>	099 SD Support Services
<b>4</b>	<b>Scope of Work/Program Design:</b>	General SD Supports, as directed by the potential SDP participant, may provide assistance and coaching and/or training individually or as part of a group setting to help the potential SDP participant(s) gain a thorough understanding of SDP. General SD Supports include services provided by a qualified General SD Supports provider to a potential SDP participant enrolling in SDP.
<b>5</b>	<b>Program Capacity:</b>	60 participants per year
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	\$50.48 per hour for a maximum of 40 hours per participant
<b>7</b>	<b>Total Potential Compensation:</b>	$\$50.48 \times 40$ (maximum hours) = \$2,019.20 (per participant) x 60 (participants) = \$121,152.00 (maximum per year) x 5 years (contract length) = \$605,760.00
<b>8</b>	<b>Term of Contract:</b>	February 18, 2025 – February 17, 2030
<b>9</b>	<b>Date of Initial Vendorization:</b>	TBD
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	None, new contracted service

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## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	Connections for Adults Living Independently, Inc. 891 Kuhn Drive, Suite 200 Chula Vista, CA, 91914
<b>2</b>	<b>Vendor #:</b>	HQ2140
<b>3</b>	<b>Type of program:</b>	Supported Living Services
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency support adults with developmental disabilities to live in their own homes (properties which the individual controls and rents or owns and which is not the residence of the parent), participate in community activities, assist in exploring their interests, and live lives that are integrated. These services and supports are patterned differently for each person. The range of supported living services and supports available include, but are not limited to, assessment of consumer needs; assistance in finding, modifying and maintaining a home; facilitating circles of support to encourage the development of unpaid and natural supports in the community; advocacy and self-advocacy facilitation; development of employment goals; social, behavioral, and daily living skills training and support; development and provision of 24-hour emergency response systems; securing and maintaining adaptive equipment and supplies; recruiting, training, hiring and scheduling individuals to provide personal care and other assistance, including in-home supportive services workers, and facilitating community participation.
<b>5</b>	<b>Program capacity:</b>	60 Individuals
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	The rate for this agency is \$40.73 per client per hour for 1:1 services and \$22.75 per client per hour for 1:2 services. Funding for the initial assessment, the initial support plan, and the processes needed to set up services for an individual (finding an apartment, purchasing furnishings and household supplies, interviewing and training the initial support staff, etc.) are \$40.73 per hour.
<b>7</b>	<b>Total potential compensation:</b>	\$40.73 per hour x 250 hours in a month = \$10,182.50 per month X 60 clients = \$610,950 per month X 60 months = \$36,657,000 total potential compensation.
<b>8</b>	<b>Term of Contract:</b>	February 15, 2025 – February 14, 2030
<b>9</b>	<b>Date of Initial Vendorization:</b>	TBD
<b>10</b>	<b>Significant changes from previous contract:</b>	N/A

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name (name facility or program): Address:</b>	Hilltop Home Care Solutions DBA Hilltop Home Care Center II 3232 Kempf St. Lemon Grove, CA 91945
<b>2</b>	<b>Vendor #:</b>	HQ2146
<b>3</b>	<b>Type of Program/level:</b>	Adult Residential Facility Level 4i/IMS approved
<b>4</b>	<b>Scope of Work/Program Design:</b>	This is a Level 4I home that serves individuals with severe behavior challenges. They provide Behavior Consultation, enriched staffing, and wake overnight staff. Also approved for IMS for individuals with restricted health conditions.
<b>5</b>	<b>Program Capacity:</b>	4; 4 private bedrooms
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	\$13,533.59 per client per month less current SSI
<b>7</b>	<b>Total Potential Compensation:</b>	\$13,533.59– \$1,420.07 (SSI)=\$12,113.52 x 4 (clients) =\$48,454.08 (monthly) x 60 (months) =\$2,907,244.80
<b>8</b>	<b>Term of Contract:</b>	February 15, 2025-February 14, 2030
<b>9</b>	<b>Date of Initial Vendorization:</b>	TBD
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	New Vendorization

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## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	Karing With Pride, Inc. 1387 Manzana Way San Diego, CA, 92139
<b>2</b>	<b>Vendor #:</b>	HQ2141
<b>3</b>	<b>Type of program:</b>	Supported Living Services
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency support adults with developmental disabilities to live in their own homes (properties which the individual controls and rents or owns and which is not the residence of the parent), participate in community activities, assist in exploring their interests, and live lives that are integrated. These services and supports are patterned differently for each person. The range of supported living services and supports available include, but are not limited to, assessment of consumer needs; assistance in finding, modifying and maintaining a home; facilitating circles of support to encourage the development of unpaid and natural supports in the community; advocacy and self-advocacy facilitation; development of employment goals; social, behavioral, and daily living skills training and support; development and provision of 24-hour emergency response systems; securing and maintaining adaptive equipment and supplies; recruiting, training, hiring and scheduling individuals to provide personal care and other assistance, including in-home supportive services workers, and facilitating community participation.
<b>5</b>	<b>Program capacity:</b>	10 Individuals
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	The rate for this agency is \$40.73 per client per hour for 1:1 services and \$22.75 per client per hour for 1:2 services. Funding for the initial assessment, the initial support plan, and the processes needed to set up services for an individual (finding an apartment, purchasing furnishings and household supplies, interviewing and training the initial support staff, etc.) are \$40.73 per hour.
<b>7</b>	<b>Total potential compensation:</b>	\$40.73 per hour x 250 hours in a month = \$10,182.50 per month X 10 clients = \$101,825 per month X 60 months = \$6,109,500 total potential compensation.
<b>8</b>	<b>Term of Contract:</b>	February 15, 2025 – February 14, 2030
<b>9</b>	<b>Date of Initial Vendorization:</b>	TBD
<b>10</b>	<b>Significant changes from previous contract:</b>	N/A

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name (name facility or program): Address:</b>	Leo Care LLC DBA Harrison Home 124 Harrison St. Oceanside, CA 92057
<b>2</b>	<b>Vendor #:</b>	HQ2148
<b>3</b>	<b>Type of Program/level:</b>	Adult Residential Facility Level 4i
<b>4</b>	<b>Scope of Work/Program Design:</b>	This is a Level 4I home that serves individuals with severe behavior challenges. They provide Behavior Consultation, enriched staffing, and wake overnight staff.
<b>5</b>	<b>Program Capacity:</b>	4; 4 private rooms
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	\$12,245.70 per client per month less current SSI
<b>7</b>	<b>Total Potential Compensation:</b>	$\$12,245.70 - \$1,398.07(\text{SSI}) = \$10,847.63 \times 4 \text{ (clients)} = \$43,390.52 \text{ (monthly)} \times 60 \text{ (months)} = \$2,603,431.20$
<b>8</b>	<b>Term of Contract:</b>	February 15, 2025-February 14, 2030
<b>9</b>	<b>Date of Initial Vendorization:</b>	TBD
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	New Vendorization

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## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name (name facility or program): Address:</b>	Rose L. Sams DBA Andrea's Place A.R.F LLC 7833 Gribble St. San Diego, CA 92114
<b>2</b>	<b>Vendor #:</b>	HQ2145
<b>3</b>	<b>Type of Program/level:</b>	Adult Residential Facility Level 4i
<b>4</b>	<b>Scope of Work/Program Design:</b>	This is a Level 4I home that serves individuals with severe behavior challenges. They provide Behavior Consultation, enriched staffing, and wake overnight staff.
<b>5</b>	<b>Program Capacity:</b>	4; 1 shared, 2 private rooms
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	\$13,533.59 per client per month less current SSI
<b>7</b>	<b>Total Potential Compensation:</b>	\$13,533.59– \$1,420.07 (SSI)=\$12,113.52 x 4 (clients) =\$48,454.08 (monthly) x 60 (months) =\$2,907,244.80
<b>8</b>	<b>Term of Contract:</b>	February 15, 2025-February 14, 2030
<b>9</b>	<b>Date of Initial Vendorization:</b>	TBD
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	New Vendorization

Document3



San Diego Regional Center  
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Serving individuals with developmental disabilities in San Diego and Imperial Counties

February 3, 2025

To: Members, SDICDSI Client Advisory Committee

Kim Rucker  
Elmo Dill  
Mark Uyeda  
Taylor Wiesner  
Cali Williams

From: Erik Rascon, Chair

Re: February 11, 2025: Client Advisory Committee Meeting

There will be a meeting of the Client Advisory Committee held at **11:00am on Tuesday February 11, 2025; location at Ruffin Road Office Conference 300.**

Join Zoom Meeting

<https://sdrc-org.zoom.us/j/86153940094?pwd=DX04tdV1va96aOepF7nRF4h4pFJiaG.1>

Meeting ID: 861 5394 0094

Passcode: Lu3kMA

The proposed agenda is:

1. Call to Order
2. Approval of minutes
3. Introductions (in-person and zoom attendees)
4. SDRC Training and Development Team to present the new Individual Program Plan.
5. Update on local self-Advocacy Groups:
  - a. St. Mad's
  - b. Noah Homes (Tim)
  - c. Imperial Valley (Peter and Eric)
6. Update on San Diego People First Advocacy Group: Viri
7. Update on Imperial Valley People First Group: Eric
8. ARCA CAC update-Viri
9. CAC-SDRC Website
  - a. Update on website links/info

Please contact Robin Bello 858-924-0870 if you have any questions, or if you are unable to attend the meeting.

cc: David Hadacek, SDICDSI Chair  
Mark Klaus, Executive Director



## CLIENT ADVISORY COMMITTEE (CAC) MINUTES

November 11, 2024

**Members Present:** Erik Rascon, Kim Rucker, Elmo Dill and Mark Uyeda.

**Staff Present:** Robin Bello, Viridiana Salgado

**Community Participants:** Calli Williams, Debbie Marshall (SCDD), Linda Butler (Westside RC CAC), Collen Baucen (St. Mad's); Peter Salgado; Zack Hill; Natalie Jackson; Desiree Boykin; James Stolarelek; Linda Anderson and Todd Rubien.

**Call to Order:** Erik Rascon, CAC Chair, called the meeting to order at 11:1 am.

**Approval of October 2024 minutes:** Members voted to approve minutes as is.

### **Presentation:**

Viri spoke about the upcoming housing event hosted by ARCA in February 2025. She will share flyers with the team.

### **Update on local Self Advocacy groups:**

- a. St. Madeleine Sophie's Center: Callie shared that the self-advocacy groups are actively occurring at St. Mad's.
- b. Noah Homes: The members meet every Thursday and Tim is the assistant to Laura Holmes.
- c. Imperial Valley People's First: Emergency Preparedness was presented in October. The group is holding elections for the People First Roles in Imperial Valley. Eric will keep the group posted.

**Update on San Diego People's First/Self-Advocacy:** Viri and Debbie talked about upcoming voter seminars and resources. Monthly meeting is still occurring 4<sup>th</sup> Friday via zoom.

### **Other:**

- Active Shooter Training
- Leading the Charge in Imperial Valley, 2/5/2025

Next meeting will be February 11, 2025.  
Meeting adjourned at 11:50 am.

cc: Dave Hadacek, SDICDSI Chair  
Mark Klaus