

# **SDICDSI Board and Committee Meetings**

**Tuesday, November 12, 2024**

**10:00 – 11:00**

**Personnel Committee – Suite 203**

**Legislation Committee – Suite 300**

**11:00 – 11:45**

**Finance Committee – Suite 300**

**Client Advisory Committee – Suite 203**

**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.sdrc.org](http://www.sdrc.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, November 12, 2024

**12:00 p.m.**

- |     |  |                           |
|-----|--|---------------------------|
| 1.  | Call to Order/Announcements  | David Hadacek             |
| 2.  | Mission Moment   | Pamela Starmack           |
| 3.  | Presentation on the National Core Indicator Data   | Zach Guzik<br>Robin Bello |
| 4.  | Performance Contract Year-End Data Presentation  | Kate Kinnamont            |
| 5.  | Public Input   |                           |
| 6.  | Approval of the Minutes<br>– October 8, 2024, Board Meeting (Action Item)  | David Hadacek             |
| 7.  | Chair’s Report   | David Hadacek             |
| 8.  | Executive Director’s Report<br>– Employees of Distinction<br>– Delegated Conservatorships Guidelines (Action Item) | Mark Klaus                |
| 9.  | Finance Committee Report<br>– Contracts for Approval (Action Item)   | Matthew Storey            |
| 10. | Association of Regional Center Agencies (ARCA) Update  | Terri Colachis            |
| 11. | Legislation Committee Report   | Norma Ramos               |
| 12. | Vendor Advisory Committee Report   | Wendy Forkas              |
| 13. | Nominating and Bylaws Committee Report   | Virginia Bayer            |
| 14. | Personnel Committee Report   | Laura Oakes               |
| 15. | Client Advisory Committee Report   | Erik Rascon               |
| 16. | Mission Moments  |                           |
| 17. | Adjourn  |                           |

The next meeting of the Board of Directors will be held on  
Tuesday, January 21, 2025, at 11:00 a.m. at the Town and Country Resort

*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.



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**BOARD OF DIRECTORS MEETING**  
**October 8, 2024**  
**Minutes**

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

**DIRECTORS ABSENT:** James Gonzalez and Timothy Riemann

**STAFF PRESENT:** Robin Bello, Brenda Bello-Vazquez, Kathy Cattell, Rhiza Daileg, Sara Fitzgerald, Sarah Franco, Rafael Gaucin, Jose Gonzalez, Celeste Graham, Michael Huffman, Andrea-Lisa King, Kate Kinnamont, Mark Klaus, Miguel Larios, Christine Lux-Whiting, Seth Mader, Sara McIntire, Dulce Morin, Gabriella Ohmstede, Victoria Otero, Jovi Rodriguez, Pedro Salcedo, Viri Salgado, Jennifer Sanchez, Bonnie Sebright, Liz Serna, Johanna Stafford, Pamela Starmack, Kimberly Steitz, Robert Webb-Rex

**GUESTS PRESENT:** Lamis Aboulhosn, Shahriar Afshar, Patricia Barber, Hunter Christian, Debra Emerson, Rachel Grondin-Martinez, Jessica Hertel, Myles Horttor, Kim Keane, Janet Latz, Michael Latz, Marie Laws, Molly Nocon, Diana Orozco, Edwin Pineda, Mackenzie Quiroz, Terry Rains, Sandra Rocco-Melville, Beba Saba, Peter Salgado, Sitara Sethi, Connie Strohbehn, Stacy Sullivan, Jill Weber, Taylor Wiesner, Becky Williams, Cali Williams

1. **Call to Order**  
David Hadacek, Chair, Board of Directors, welcomed everyone in attendance and called the meeting to order at 12:09 p.m.
2. **Presentation on the FY 2024-25 Operations Spending Plan**  
Dulce Morin, San Diego Regional Center (SDRC) Chief Financial Officer, and Robert Webb-Rex Associate Director of Business Services presented information on the proposed fiscal year (FY) 2024-25 Operations Spending Plan.
3. **Cultural and Linguistic Competency Presentation**  
Jennifer Sanchez SDRC Diversity Equity Inclusion and Accessibility Manager, Brenda Bello-Vazquez, SDRC Cultural Specialist, and Pedro Salcedo, SDRC Language Accessibility Specialist, presented information on cultural and linguistic competency and the SDRC's efforts to provide language accessibility to all of their clients.
4. **Public Input**  
Hunter Christian, Executive Director of Villa de Vida, announced that they will be hosting a Voting Summit on Tuesday, October 15, 2024, from 10:00 a.m. to 12:00 p.m.

Sitara Sethi, Executive Director of the Foundation for Developmental Disabilities, announced their Season of Sharing Fundraiser event scheduled for November 17, 2024, at 3:00 p.m. at Stone Brewing in

Liberty Station. All proceeds will go to providing gift cards to SDRC clients and their families in need, helping them to celebrate the holidays.

Terry Rains, who holds power of attorney and is the healthcare directive agent for an individual served by the SDRC presented a concern regarding an SDRC Social Security payeeship.

5. **Approval of Minutes**

Mr. Hadacek referred the Directors to the draft minutes of the September 10, 2024, Board of Directors meeting and asked for approval.

**MOTION: M/S/C that the Minutes of the September 10, 2024, Board of Directors meeting are approved as submitted.**

6. **Chair's Report**

Mr. Hadacek reported that the Executive Committee completed the Executive Director's annual performance review.

Mr. Hadacek remarked that the SDRC Family Vendor Resource Fair was a huge success and thanked Jennifer Sanchez and all SDRC staff who helped coordinate the event which hosted nearly 2,000 SDRC clients and family members and included 350 SDRC vendors.

Mr. Hadacek reminded everyone that the DDS Master Plan Committee will meet on October 9, 2024, and the California Indian Symposium is scheduled for October 9 and 10 at the Pala Resort.

7. **Executive Director's Report**

Mr. Klaus reported that by the end of September 2024, the total SDRC caseload had grown to 43,749 which is an increase of 3,663 over the past year.

Mr. Klaus announced that the SDRC Board of Directors Annual Meeting will be held on January 21, 2025, at the Town and Country Resort and Pete Cervinka, the Acting Director of the Department of Developmental Services (DDS) will be the keynote speaker.

Mr. Klaus announced that the National Core Indicator presentation and the SDRC Performance Contract Year-End review will be held at next month's Board meeting on November 12, 2024, at 12:00 noon. At this meeting, SDRC will be requesting public input.

Mr. Klaus recognized Michael Huffman as an Employee of Distinction.

8. **Finance Committee Report**

Treasurer Matthew Storey reported that the Finance Committee reviewed the proposed service provider contracts and recommended that the Board approve all ten (10) contracts.

**MOTION: (Forkas and Oakes abstained) M/S/C to approve the contracts for services with PY3526 Brilliant Corners (Acquisition); PY3526 Brilliant Corners (Renovation); PY3450 Carine Jeronne DBA SDP Facilitation for Autism & More; HQ2104 Emmanuel Family Homes Inc. DBA Emmanuel Family Home; HQ0571 F3 Supported Living Services, LLC; HQ1424 Love Shines Thru Supported Living Services; HQ0334 Martinez Transportation; PQ8482 et al. Public**

**Partnerships LLC; HQ2075 Tuluma Rodriguez Corporation DBA New Beginnings Bertha's Family Home; and PY3066 Unexpected Possibilities (addendum).**

Mr. Storey reported that the members of the Finance Committee reviewed the proposed FY 2024-25 Operations Spending Plan and recommended that the Board approve the plan.

**MOTION: M/S/C to approve the proposed FY 2024-25 Operations Spending Plan.**

9. **Association of Regional Center Agencies Update**

Terri Colachis reported that the ARCA Academy which was held on September 6 and 7, 2024, at Inland Regional Center was very well attended and SDRC was well represented.

Ms. Colachis announced that the ARCA Board of Directors will be meeting at the Hyatt Regency Mission Bay on October 18, 2024, from 8:30 to 12:00 noon.

Assembly Bill 1147 which was signed by Governor Newsom will make regional centers subject to the Public Records Act as of January 1, 2026. This bill will also prohibit regional center employees from accepting gifts in excess of \$15 annually, and prohibit senior regional center staff from hiring relatives as of January 1, 2025.

Assembly Bill 2423 will require the Department of Developmental Services (DDS) to update rate models for service providers every other year, beginning in 2025.

Senate Bill 1197 will make foster children receiving regional center services eligible for respite care.

10. **Vendor Advisory Committee Report**

Ms. Forkas thanked SDRC for hosting the Lanterman Coalition's strategic planning meeting on October 4, 2024. The Lanterman Coalition will be focusing on providing input to the DDS Master Plan Committee, the rate model implementation and needed rate fixes, affordable housing, transportation, remote services, and the regional center corestaffing formula.

Ms. Forkas clarified that while AB 2423 will require DDS to review and update vendor rates, it does not guarantee the implementation of new rates; however, it will generate the data necessary to assist in rate negotiations.

Ms. Forkas reported that she received highly positive feedback on the SDRC Family Vendor Resource Fair noting that it was both effective and efficient, with vendors receiving numerous referrals.

The next meeting of the Vendor Advisory Committee is scheduled for November 21, 2024.

11. **Nominating and Bylaws Committee Report**

Virginia Bayer reported that Nominating and Bylaws Committee will meet later in the day and will interview two Board applicants. The members of the committee have been reviewing Board composition and have been working to plan for upcoming vacancies as Shirley Nakawatase, Timothy Riemann, and Angela Yates will be retiring as of January 31, 2025.

12. **Personnel Committee Report**

Laura Oakes reported that the SDRC tuition reimbursement program will be reinstated.

Ms. Oakes reported that Personnel Committee will review the employee handbook and present its proposed revisions next year.

13. **Client Advisory Committee Report**

Erik Rascon reported that the Client Advisory Committee received a presentation on the Special Olympic Program.

Mr. Rascon reported that the Client Advisory Committee continues to grow in attendance.

The members of the Committee discussed voting rights and the SDRC Family Resource Fair.

14. **Mission Moments**

Virginia Bayer shared pictures of staff working at the SDRC Family Vendor Resource Fair. Ms. Bayer thanked Miguel Larios, Tiffany Swan, and Jennifer Sanchez and all of the SDRC volunteers who helped organize the event.

Erik Rascon announced his appreciation for everyone's well wishes and shared that his mother is doing well after her surgery.

Miguel Larios, SDRC Director of Community Services, presented Home and Community Based Services (HCBS) Rule comic books, developed in collaboration with Tri-Counties Regional Center in both English and Spanish, to help clients and families to better understand HCBS. These comic books have distributed to residential facilities.

Chris Hodge announced that his son graduated from San Marcos State University with a degree in computer science. Mr. Hodge expressed his appreciation for the SDRC Family Vendor Resource Fair and expressed his pleasure at seeing a table for the National Foundation for Autism Research (NFAR).

15. **Adjournment/Next Meeting**

There being no other business, the meeting adjourned at 1:23 p.m. The next meeting of the Board of Directors is scheduled for Tuesday, November 12, 2024, at 12:00 p.m.



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## MEMORANDUM

**DATE:** November 5, 2024  
**TO:** Board of Directors  
**FROM:** Mark Klaus, Executive Director  
**RE:** Executive Director's Report

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

During October, 907 cases were opened through intake at the San Diego Regional Center (SDRC). There were 541 (60%) cases opened in the Early Start Program for infants and toddlers younger than three years of age. During the month, 115 cases were reactivated, 158 cases were inactivated, and 483 cases were closed. At the end of October, the total regional center caseload was 44,124. This is an increase of 1,195 from July 1, 2024.

### **2024 Board Composition Response:**

Pursuant to Welfare & Institutions (W&I) Code section 4622.5, each regional center governing board is required to detailed documentation, as determined by the Department of Developmental Services, demonstrating that the composition of the board is in compliance with section 4622. On October 9, 2024, SDRC received notification (letter attached) that SDRC's Board composition complies with all requirements pursuant to W&I Code section 4622. The letter states, "The Department recognizes the tremendous commitment and responsibility involved in board membership and appreciates SDRC's efforts. The Department also recognizes the complexity of maintaining compliance within the context of SDRC's Bylaws, board member term limits, and the multi-faceted contributions of each board member."

### **Employee of Distinction:**

Juan Gonzalez - Nominated by Erik Peterson:

Juan has held the position of Health and Safety Waiver Specialist in Community Services since September of 2023. He has been unrelenting in his pursuit of helping individuals, families, and service providers in dire need of rate increases in order to access and enhance the services they need. This is a relatively new position within SDRC. Juan excelled in informing our community of this opportunity by providing training and information sessions to service coordinators, our provider community, and the individuals we support. He meticulously works through Health & Safety worksheets line by line and sifts through complicated financial documents and client information to ensure accuracy and that the rate increase is warranted. Juan's efforts have resulted in securing Health & Safety Waivers that have positively impacted the lives of over 250 people we serve. Juan continues to work tirelessly for those we serve and our community partners, and his dedication and commitment are greatly appreciated.

Francis Almario – Nominated by Rafael Gaucin

Francis has demonstrated consistent, person-centered, efficient, and timely service to our community, frequently going above and beyond. He does so in his fieldwork and within the unit. It is noteworthy that Juan has been able to manage numerous highly complex placement cases that are emotionally charged and time-consuming, all leading to successful outcomes. With a combination of patience, steadfastness, and expert knowledge, Francis helped create successful and harmonious outcomes that have been life-changing. Additionally, he



consistently acts in a person-centered manner and is able to manage conflict-prone cases toward stability. He has maintained a calm, cool, and highly professional demeanor during these processes. Francis routinely goes above and beyond with his casework and exemplifies the SDRC mission with successful results for the benefit of our community.

**Bernadette Boren – Nominated by Jennifer Sanchez**

Bernadette is SDRC's Tribal Outreach Specialist. She is responsible for coordinating outreach activities to tribal communities and agencies that serve tribal families related to information about SDRC services and resources for individuals with developmental disabilities. Bernadette assumed the position of Tribal Outreach Specialist in 2023 and has established a positive, collaborative relationship between SDRC and many of our tribal communities in San Diego and Imperial counties. She has been instrumental in developing and maintaining trust with tribal communities by constantly communicating with families and agencies and showing up to all events and meetings. She is a strong advocate for Native families within her community. Bernadette recently co-led the 3<sup>rd</sup> Annual California Tribal Symposium for People with Developmental Disabilities alongside Season Goodpasture. She collaborated with multiple leaders to plan and execute this successful event. She not only can lead our work with Native communities, but she also supports other team members when working with other communities. She is truly a team player, and we are honored to have her as a part of our group.

**El Arc de California:**

SDRC is honored to be hosting El Arc de California and the Latino Disability Leadership Summit on December 5 and 6, 2024. Over the course of these two days, participants will learn leadership development; coalition building and storytelling for community mobilization, crafting persuasive messages and overcoming linguistic and cultural barriers, understanding how laws are made and identifying key intervention points for advocacy, and advancing skills for engaging policymakers, organizing community support, and providing testimony. SDRC will be well represented as we have Jennifer Sanchez (Diversity, Equity, Inclusion and Access Program Manager), Delia Yepez (Enhanced Service Coordination Program Manager), and Board members Tessie Bradshaw and Norma Ramos, who will be in attendance.

**Association of Regional Center Agencies (ARCA) Board Meeting in San Diego:**

The ARCA Board of Directors and Committees met at the Hyatt Regency Mission Bay in San Diego on October 17 and 18, 2024. I've attached a copy of the presentation shared with the ARCA Board regarding SDRC's outreach efforts, including those focused on individuals who are unhoused, have immigration issues, and Tribal outreach. A huge thank you to Jennifer Sanchez, Sonia Griffin, Noemi Silva, and Bernadette Boren for presenting. I also want to thank Board members Norma Ramos and Virginia Bayer for attending.

**Tribal Symposium:**

On October 9 and 10, 2024, SDRC, along with the Department of Developmental Disabilities (DDS) and Acorns to Oak Trees, hosted the 3<sup>rd</sup> Annual California American Indian Symposium on Intellectual and Developmental Disabilities at Pala Resort. The feedback from the attendees and participants was overwhelmingly positive! With over 380 registered attendees, this year had the most participants registered and attended. A huge thank you to Dave Hadacek, Norma Ramos, and Tessie Bradshaw for attending and representing SDRC.

**SDRC's Annual Meeting:**

Once again, a reminder to hold Tuesday, January 21, 2025, for SDRC's Annual meeting to be held at the Town and Country Resort. Pete Cervinka, Acting Director for DDS, is the confirmed keynote speaker. Additional information will be available as we get closer to the date.

Executive Director's Report  
November 5, 2024  
Page 3 of 3

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



PETE CERVINKA  
ACTING 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

October 9, 2024

David Hadacek, Board Chair  
Mark Klaus, Executive Director  
San Diego Regional Center  
4355 Ruffin Road, Suite 200  
San Diego, CA 92123

Dear David Hadacek and Mark Klaus:

Thank you for completing and submitting the 2024 Board Composition Survey issued by the Department of Developmental Services (Department). Pursuant to Welfare & Institutions (W&I) Code section 4622.5, "By August 15 of each year, the governing board of each regional center shall submit to the Department detailed documentation, as determined by the Department, demonstrating that the composition of the board is in compliance with section 4622." San Diego Regional Center (SDRC) submitted a completed survey on July 30, 2024.

SDRC's Board composition complies with all requirements pursuant to W&I Code section 4622. SDRC's Bylaws state that the Board of Directors should have a range of 15 to 25 members. The survey lists 18 members as serving on the board and all their terms of office fall within the statutory limits. SDRC's Board also includes a member from the provider advisory committee as required.

SDRC's diligence with board composition is demonstrated in meeting the requirements of geographic, racial and ethnic, and disability representation. SDRC's Board maintains requisite members with legal, management or board governance, finance, and developmental disability program expertise, as well as members with an interest in, or knowledge of, developmental disabilities. The Department also acknowledges the required inclusion of individuals receiving regional center services and parents/legal guardians of individuals served.

As a reminder, the Department is notifying you that the submitted survey shows SDRC's Board Members Shirley Nakawatase, Timothy Riemann, and Wendy Forkas will reach the board membership term end date in January 2025, prior to the next board composition survey.

The Department recognizes the tremendous commitment and responsibility involved in board membership and appreciates SDRC's efforts. The Department also recognizes the complexity of maintaining compliance within the context of SDRC's Bylaws, board member term limits, and the multi-faceted contributions of each board member.

David Hadacek, Board Chair  
Mark Klaus, Executive Director  
Page 2

If you have questions regarding this correspondence, please contact Edwin Pineda, Primary Regional Center Liaison, Office of Community Operations, at (951) 405-2004 or by email at [Edwin.Pineda@dds.ca.gov](mailto:Edwin.Pineda@dds.ca.gov).

Sincerely,

*Original Signed by:*

ERNIE CRUZ  
Deputy Director  
Community Services Division

cc: Amy Westling, Association of Regional Center Agencies  
Tiffani Andrade, Department of Developmental Services  
Christine Bagley, Department of Developmental Services  
Jacqueline Gaytan, Department of Developmental Services  
Edwin Pineda, Department of Developmental Services



S|D|R|C

San Diego Regional Center

# Child Find Activities

American Rescue Plan Act (ARPA) Part C

New initiative developed by the Department of Developmental Services (DDS) for targeted outreach to families experiencing homelessness and immigration issues.



# Regional Center Responsibility

- Identify leads (Services Coordinators) who will coordinate and track activities for DDS reporting.
- Contract with Early Start service providers who can complete on-site developmental questionnaires.
- Identify and reach out to agencies that serve families who are unhoused and are fearful of accessing services due to their immigration status.
- Participate in community events and complete on-site developmental questionnaires.



# Outreach Efforts

- Provide Early Start eligibility, intake, and services. All brochures: English and threshold languages. CARDS with SDRC contact information in all threshold languages (English, Spanish, Chinese, Tagalog, Vietnamese, Persian, and Arabic).
- Provide Early Start check-off list and SDRC contact information at community events.
- Obtain as much contact information as possible from family such as alternate phone numbers, email, etc.
- Follow up with families after referral has been completed.
- Provide flyers to put up at community events and shelters indicating dates for on site developmental questionnaires.
- Ran radio ads in Spanish and put up billboards in Imperial County.



# SAN DIEGO COUNTY

## **Collaboration with community partners:**

We have established ongoing relationships with the Mexican Consulate, MACC, La Maestra Community Clinic, Neighborhood House, SDCOE, ECS, Para las Familias, Father Joe's Village, San Diego Rescue Mission, Birthline of San Diego, South Bay Community Services and Doors of HOPE.

## **Partnered with these organizations for several events:**

Chicano Federation, Chula Vista Community Collaborative, Family Health Center, San Ysidro Health Center, Vista Community Clinic, Dreams for Change, HDS, SAY SD, CARE, First Five, Live Well (SD County) Homeless Solutions & Migrant Education and many others.



# San Diego County

## Community Events

### Mexican Consulate Monthly Events

DJ Tomko, DDS

Noemi Silva, ARPA  
Part C: Imperial

Sonia Griffin,  
ARPA Part C:  
San Diego



# San Diego County

## Community Events



SDRC staff, STARS, and District Attorney Summer Stephan



# San Diego County

## Community Events

Health and Resource Fair



Screening Babies



# San Diego County

Data for August 2022 – September 2024

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## EVENTS:

- 116 Community Events
- 42 Shelter Visits
- 35 Presentations for community partners promoting Early Start and ARPA Part C initiative

## OUTCOMES:

- 506 Babies screened
- 325 Referred
- 139 Eligible (receiving Early Start services)
- 5 Pending IDA assessments



# Imperial County



Welcome to the Imperial County Migrant Education Program- Region VI

Department of Social Services

CONSULADO DE MÉXICO EN CALÉXICO, CALIFORNIA



Imperial Valley Continuum of Care Council  
Vulnerable Population Committee



# Imperial County

## Community Events



# Imperial County

## Community Events



Go Gold for Childhood Cancer



Joab Gonzales SDR Manager of Client Services,  
Imperial County Office  
Tarcisio Navarrete- Mexico's consul in Calexico  
Mario Beltran Mainero- Deputy Consul at Consulate  
of Mexico in Calexico



Early Start flyer prominently  
displayed at Calexico One Stop



El Grito de Independencia





# Imperial County

Data for August 2022 – September 2024

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## EVENTS:

- 92 Community Events
- 2 Shelter Visits
- 6 Presentations for community partners promoting Early Start and ARPA Part C initiative

## OUTCOMES:

- 123 Babies screened
- 86 Referred
- 74 Eligible (ES services)
- 1 Pending assessment



# TRIBAL ENGAGEMENT

## Service Access and Equity

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SDRC Tribal Outreach Specialist:

Coordinates outreach activities to tribal communities to provide information on Regional Center systems and available services for individuals with intellectual/developmental disabilities.

Identify service gaps in the tribal communities, identify the unmet needs, and assist with resource development to increase access to services.

Assist service providers through the Regional Center vendor process.

Assist with the planning, development, and implementation of training materials focused on intellectual/developmental disabilities, tribal communities, and their unique needs.



# TRIBAL ENGAGEMENT

## Service Access and Equity

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### EVENTS and PRESENTATIONS

Viejas Family Literacy Fun  
Pala Honoring Traditions  
SIHC 25th Annual NAHWC  
CIEFA Summer Summit  
County of San Diego CFWB and ISU  
Viejas TED, Rec Center, Wellness Center  
SIHC ICSS  
Sycuan Department of Education  
CTFC 2nd Annual I/DD Symposium  
Back to School Events  
Barona Powwow  
Sycuan Powwow

### OUTCOMES

Screenings: 36  
Referrals: 25  
Over 3 Referrals: 21  
4 reactivated cases



# Tribal Engagement

## SERVICE ACCESS AND EQUITY



# THANK YOU

Sonia Griffin, M.A.  
Early Childhood Service Coordinator- South Inland  
San Diego Regional Center  
[Sonia.Griffin@sdrc.org](mailto:Sonia.Griffin@sdrc.org)

Noemi Silva, B.S.  
Early Childhood Service Coordinator- Imperial County  
[Noemi.Silva@sdrc.org](mailto:Noemi.Silva@sdrc.org)

Bernadette Boren, B.A.  
Tribal Outreach Specialist  
[Bernadette.Boren@sdrc.org](mailto:Bernadette.Boren@sdrc.org)





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## Memorandum

DATE: November 5, 2024  
TO: Members, Board of Directors  
FROM: Mark Klaus, Executive Director  
RE: Delegated Conservatorship Guidelines

During your Board meeting on November 12, 2024, I will be requesting the Board's approval of newly drafted guidelines for delegated conservatorships. On July 31, 2024, the Department of Developmental Services provided guidelines to regional centers about delegated conservatorships, which are authorized by Health and Safety (H&S) Code Section 416.19 and occur when DDS is appointed as an individual's conservator and delegates the day-to-day conservatorship authority to the regional center serving the conservatee. These guidelines outline the responsibility of the delegated conservator to mitigate conflicts of interest.

The DDS directive dated July 31, 2024, and the SDRC draft guidelines to mitigate conflicts for delegated conservatorships are attached to this memorandum.

Please feel free to contact me before the Board meeting if you have any questions.



July 31, 2024

TO: REGIONAL CENTER EXECUTIVE DIRECTORS

SUBJECT: GUIDELINES TO MITIGATE CONFLICTS FOR DELEGATED CONSERVATORSHIPS

This correspondence provides guidelines to regional centers about delegated conservatorships. Delegated conservatorships are authorized by Health and Safety (H&S) Code Section [416.19](#) and occur when the Department is appointed as an individual's conservator and delegates the day-to-day conservatorship authority to the regional center serving the conservatee. These guidelines provide direction on addressing the conflicts that may arise when a regional center is the delegated conservator while also providing service coordination and provide a process a conservatee or their legal representative may use if they are dissatisfied with the way the regional center is carrying out its delegated conservatorship responsibilities.

These guidelines are required pursuant to H&S Code Section 416.19, and is consistent with delegated conservatorship responsibilities identified in regional center contracts with the Department and the Department's authority to oversee and monitor the way regional centers provide services.

Guidelines Regarding Delegated Conservator Responsibility to Mitigate Conflicts of Interest

Regional centers have the following responsibilities as a delegated conservator:

1. Monitoring of the conservatee's health, safety and well-being and protection of their rights. This includes providing the Department with monthly updates about any changes which impact the conservatee's health, safety or well-being and changes to their services or service needs.
2. Maximizing the conservatee's autonomy and supporting the conservatee in making their own decisions. The regional center shall, to the greatest extent possible, make decisions consistent with the conservatee's preferences including current and previously expressed preferences. These preferences may be made through spoken and non-spoken means of communication including alternative or augmentative communication. This would also include informing the conservatee timely about all decisions the regional center makes on their behalf.

3. Considering, at each Individual Program Plan (IPP) meeting, if there are services and/or natural supports that will assist the conservatee in becoming more independent, increasing their decision-making abilities, and exploring alternatives to conservatorship.
4. Developing a comprehensive person-centered biennial assessment of the conservatee's needs including the need for a conservatorship, alternative decision-making options, services needed to increase the conservatee's decision-making abilities and any proposed changes to the conservatorship powers. The conservatee shall have the opportunity to participate in this assessment and to identify other individuals that should be contacted as part of this assessment.
5. Mitigating potential conflicts of interest by separating the regional center service coordination functions from the delegated conservatorship responsibilities. This means that neither a conservatee's service coordinator, co-worker belonging to the same unit, nor their supervisor should carry-out the day-to-day conservatorship responsibilities to avoid a conflict of interest.

The regional center staff member(s) who carries out the day-to-day conservatorship duties shall:

- Meet at a minimum quarterly, in person, with the conservatee.
- Timely inform the conservatee about all decisions made by the regional center on their behalf.
- Timely address with the appropriate regional center staff or external consultants any concerns about the conservatee's health, safety and well-being, violations of their rights, their satisfaction with current services and living arrangement and the need for additional or different services. They also shall support the conservatee in raising any concerns they may have.
- Provide information about the conservatee's preferences and needs as part of the comprehensive person-centered biennial assessment. Provide recommendations about the need for the conservatorship, alternatives to conservatorship, changes to the conservator's powers, and the availability of others who may be able to serve as conservator.
- Support the conservatee's participation in the IPP review meeting and other meetings, as requested by the conservatee.
- Assist the conservatee in resolving any concerns they may have about the conservatorship or their regional center services by informing them of the process to request assistance from the Department and/or referring them to other resources who may be able to assist them.



Regional Center Executive Directors  
July 31, 2024  
Page three

Within 120 days from the date of this correspondence, each regional center must provide the Department, for its review and approval, a board approved policy specifying how it will carry-out its delegated conservatorship responsibilities consistent with these guidelines. The policy shall also specify the expected qualifications for staff carrying out the day-to-day conservatorship responsibilities and any training provided to regional staff about conservatorships in addition to that provided by the Department.

Process for Requesting Assistance from the Department

A conservatee or their legal representative who is dissatisfied with a regional center's performance in carrying out its delegated conservatorship responsibilities may request assistance from the Department in resolving their concerns through:

- The Department's Ombudsperson at: [Ombudsperson@dds.ca.gov](mailto:Ombudsperson@dds.ca.gov) or (877) 658-9731.
- The Department's conservatorship liaison office at: [ddsconservatorship@dds.ca.gov](mailto:ddsconservatorship@dds.ca.gov) or (833) 421-0061.

If you have any questions about this correspondence, please send an email to [ddsconservatorship@dds.ca.gov](mailto:ddsconservatorship@dds.ca.gov).

Sincerely,



ERNIE CRUZ  
Deputy Director  
Community Services Division

cc: Regional Center Directors of Client Services  
Amy Westling, Association of Regional Center Agencies  
Nancy Bargmann, Department of Developmental Services  
Brian Winfield, Department of Developmental Services  
Carla Castañeda, Department of Developmental Services  
Pete Cervinka, Department of Developmental Services  
Jim Knight, Department of Developmental Services  
Tiffani Andrade, Department of Developmental Services  
Maria Nunez, Department of Developmental Services



## **Guidelines to Mitigate Conflicts for Delegated Conservatorships**

### **San Diego Regional Center Policy**

#### **Introduction:**

San Diego Regional Center (SDRC) believes that all persons with developmental disabilities have the right to live productive and satisfying lives as valued members of their community. We strive to serve and empower people with disabilities and their families, and provide support that they are treated with respect, offered choices, and are healthy and safe. This includes individuals who are conserved by the Department of Developmental Disabilities (DDS).

#### **Delegated Conservatorships:**

Delegated conservatorships are authorized by Health and Safety (H&S) Code Section 416.9 and occur when DDS is appointed as an individual's conservator and delegates the day-to-day conservatorship authority to the regional center serving the conservatee.

#### **Purpose:**

There are potential conflicts that may arise when a regional center is the delegated conservator while also providing service coordination to the individual. San Diego Regional Center has developed a policy to ensure the health and safety and appropriate representation of individuals who are conserved by the Department of Developmental Services. This policy has been created, per H&S Code Section 416.9 and the San Diego Regional Center's contract with the Department of Developmental Services. It will address the process a conservatee or their legal representative may use if they are dissatisfied with the way the regional center is carrying out its delegated conservatorship responsibilities.

#### **Mitigating Potential Conflicts of Interest:**

San Diego Regional Center has outlined the differences between the role of the service coordinator and the role of the delegated conservator.

#### **DDS Conservatorship Designee Role:**

San Diego Regional Center delegates the conservatorship duties to the Appeals and Fair Hearing Coordinator.

A DDS conservatorship designee will be assigned to each DDS conservatee. This individual will not complete service coordinator responsibilities and will play a key role in the planning team by mitigating potential conflicts of interest. This individual cannot be a co-worker belonging to the same unit of the service coordinator nor their direct supervisor.

#### **The duties include:**

- Meet at a minimum, quarterly, in person, with the conservatee and would be separate from the SC meeting. This is separate from the quarterly review of the IPP conducted by the assigned service coordinator.

- Attendance at all annual review meetings and IPPs meetings.
  - Support the conservatee’s participation in planning team meetings.
  - Review if there are services and/or natural supports that will assist the conservatee in becoming more independent and increase their decision-making skills.
- Monitoring of the conservatee’s health, safety, and well-being and protection of their rights.
- Review the monthly check-in DDS Conservatorship Spreadsheet with the assigned service coordinator and follow-up with any needed changes to support the health, safety and well-being of the conservatee and changes to their services or service needs.
- Advocate and ensure the individual is maximizing their autonomy and supporting the conservatee in making their own decisions.
- Make decisions on behalf of the conservatee
  - When it is necessary to ensure the health and safety and is immediate
  - Review the conservatee’s preferences expressed currently or previously
  - Communicate all decisions to the conservatee timely
  - Obtain all information from the planning team to support well informed decisions
- Approve and sign client forms
  - Designee will formally sign all documents that need to be signed on the conservatee’s behalf. This includes but is not limited to the Standardized Annual Review Form, Individualized Program Plan, Benefit Review Form, Authorization for Release of Information Form, Choice of Status Form, Admission Agreements, documentation for benefits.
  - Designee will assist with the medical consents and collaborate with the SDRC physician consultant and/or other SDRC consultants to support the person’s health.
- Actively participate and support appropriate conservatorship removal and explore alternatives to conservatorship, including supported decision making.
- Develop a comprehensive person-centered biennial assessment, include feedback from the conservatee
- Address with the appropriate SDRC staff, or community protective agencies, if there are concerns about the health, safety, well-being of the person, violations of their rights, or expression of their dissatisfaction with their current living arrangements.
- Assist the conservatee in resolving any concerns they may have about the conservatorship or their regional center services by reviewing the process to obtain assistance from DDS.
- Participation in Conservatorship Hearings, as necessary.

**Qualifications and Training:**

Education:

Minimum, a Bachelor’s degree and 3 years of experience working with persons with developmental disabilities in a professional capacity with at least three years of supervisory or management experience.

Regional Center Experience:

Minimum of three years experience at a regional center and knowledge of California law, Lanterman Developmental Disabilities Services, Title 17, Title 22 of the California Code of Regulations, probate, LPS and conservatorships.

Trainings:

- Alternatives to Conservatorship- Supported Decision Making
- DDS Conservatorship Nomination Process
- Regional Center Clients’ Rights
- Life Planning

- Person-Centered Planning Facilitation Skills

**Process for Requesting Assistance from DDS:**

A conservatee or their legal representative who is dissatisfied with a regional center's performance in carrying out its delegated conservatorship responsibilities may request assistance from the DDS in resolving their concerns through:

- DDS's Ombudsperson at: [Ombudsperson@dds.ca.gov](mailto:Ombudsperson@dds.ca.gov)  
or (877) 658-9731
- DDS's Conservatorship Liaison Office at: [ddsconservatorship@dds.ca.gov](mailto:ddsconservatorship@dds.ca.gov)  
or (833) 421-0061

This policy will be reviewed with the conservatee and review and/or updates will be made annually.



**SDICDSI FINANCE COMMITTEE MEETING**  
**Tuesday, November 12, 2024**  
**Suite 300 Conference Room and via Zoom**  
**11:00 a.m.**

**AGENDA**

1. Call to Order
2. Approval of Minutes (Attached – Action Item)  
-October 08, 2024, Finance Committee Meeting.
3. Approval of Purchase of Service Contracts (Attached – Action Item)  
*-See the attached listing of (9) nine provider contracts.*
4. Fiscal Year 2024/2025 Purchase of Services (POS) Monthly Status Report. (Attached – Information Item)
5. Fiscal Year 2024/2025 Operations (OPS) Spending Plan Reports. (Attached – Information Item)
6. Old Business/New Business
7. Adjourn

**Committee Members:**

Virginia Bayer  
James Gonzalez  
Chris Hodge

Matt Storey (Chair)  
Wade Wilde (Community Representative)  
Angela Yates



**SDICDSI FINANCE COMMITTEE MEETING MINUTES**  
**Tuesday, October 08, 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:** Kate Kinnamont, 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 11:01 am by Matt Storey, Finance Committee Chair.

1. **Approval of Minutes:** The draft minutes of the September 10, 2024, Finance Committee meeting were approved.
2. **Approval of Purchase of Service Contracts:** The committee discussed approving the ten (10) purchase of services contracts presented to the Board.

M/S/C to recommend that the Board of Directors approve the ten (10) purchase of services contracts presented to the Board.

3. **Proposed Fiscal Year 2024/2025 Operations (OPS) Spending Plan:** The proposed fiscal year (FY) 2024/2025 operations (OPS) spending plan was discussed. The total projected expenditures are \$123, 249,038. The spending plan includes a 3% increase for all current SDRC staff, effective October 1, 2024 who are in good standing. Additionally, employees would also be eligible for an additional 2% salary increase at the time of their annual performance review.

M/S/C to recommend that the Board of Directors approve the proposed fiscal year 2024/2025 operations (OPS) spending plan presented to the Board.

4. **Fiscal Year 2024/2025 Operations Spending Plan Report:** Dulce Morin reviewed the FY 2024/2025 estimated OPS spending plan. The projected expenditures are \$114,084,234. Net OPS expenditures through August 31, 2024 were \$15,280,280.
  
5. **Fiscal Year 2024/2025 Purchase of Services (POS) Monthly Status Report:** Dulce Morin reviewed the FY 2024/2025 estimated POS spending plan. Actual POS expenditures through August 31, 2024 were \$121,777,103. Total projected POS expenditures are \$781,801,281.

The estimated POS Monthly Status Report and the Estimated Operations Spending Plan Reports will be adjusted after the first amendment to the “A” year contract (Fiscal Year 2024/2025 A-1 Contract Amendment) is approved by the Board of Directors.

6. **Adjourn:** There being no further business, the Finance Committee meeting was adjourned at 11:46 am.

---

Matt Storey  
Finance Committee Chair

c: Dave Hadacek  
Mark Klaus

**San Diego Regional Center  
Fiscal Status Report Summary  
For the Three Month Period Ending September 30, 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	\$ 813,356,274 *	\$ 786,179,806	\$ 27,176,468
Community Placement Plan	100,000	100,000	-
Total POS	<u>813,456,274</u>	<u>786,279,806</u>	<u>27,176,468</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>\$ 936,705,312</u></b>	<b><u>\$ 909,528,844</u></b>	<b><u>\$ 27,176,468</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>8,000,000</u>		
Total Purchase of Service Allocation	<u>\$ 813,356,274</u> *		



**San Diego Regional Center  
Purchase of Service Monthly Status Report  
For the Three Month Period Ending September 30, 2024**

	<b>A FY2024/2025 A-1 Allocation</b>	<b>B FY2024/2025 Expenditures 09/30/2024</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	\$ 247,215,040	\$ 56,954,920	\$ 185,407,146	\$ 242,362,066	\$ 4,852,974
Day Activity	174,288,854	41,443,177	130,532,331	171,975,508	2,313,346
Habilitation	20,243,727	3,844,951	13,921,219	17,766,170	2,477,557
Medical Services	14,290,831	2,510,617	9,763,621	12,274,238	2,016,593
Non-Med Services	51,732,557	10,669,094	37,361,015	48,030,109	3,702,448
Support Services	93,245,556	20,969,340	69,490,837	90,460,177	2,785,379
Early Childhood	34,523,464	7,622,986	24,206,523	31,829,509	2,693,955
Transportation	33,572,099	7,042,854	22,864,356	29,907,210	3,664,889
Other	144,244,146	33,352,542	108,222,277	141,574,819	2,669,327
<b>Total Purchase of Services (POS)</b>	813,356,274	184,410,481	601,769,325	786,179,806	27,176,468
less: ICF/SPA POS Reimbursements	(8,000,000)	(2,016,125)	(5,983,875)	(8,000,000)	-
<b>Net Balance (A-1)</b>	<u>\$ 805,356,274</u>	<u>\$ 182,394,356</u>	<u>\$ 595,785,450</u>	<u>\$ 778,179,806</u>	<u>\$ 27,176,468</u>
<b>CPP</b>					
<b>CPP POS Expenses</b>	\$100,000	\$11,325	\$88,675	\$100,000	\$ -
<b>Total CPP (A-1)</b>	<u>\$100,000</u>	<u>\$11,325</u>	<u>\$88,675</u>	<u>\$100,000</u>	<u>\$ -</u>

**San Diego Regional Center**  
**Fiscal Year 2024/2025 Operations Spending Plan**  
**For the Three Month Period Ending September 30, 2024**

	<u>Spending Plan</u>	<u>Expended YTD (09/30/2024)</u>	<u>Projected Expenditures Remaining</u>	<u>Total Projected Expenditures</u>
<b>Personnel</b>				
Salaries	\$ 73,149,523	\$ 14,873,744	58,275,779	\$ 73,149,523
Fringe Benefits	26,932,333	4,283,593	22,648,740	26,932,333
Temporaries	611,229	120,263	490,966	611,229
Subtotal Personnel	<u>100,693,085</u>	<u>19,277,600</u>	<u>81,415,485</u>	<u>100,693,085</u>
<b>General Expense</b>				
General Exp, Supplies & Tech	4,767,448	250,677	4,516,771	4,767,448
General Maint. & Construction	2,704,713	55,130	2,649,583	2,704,713
Equipment Purchases	985,031	0	985,031	985,031
Information Technology	775,259	310,790	464,469	775,259
Building Services	734,319	253,765	480,554	734,319
Postage	196,913	120,177	76,736	196,913
Utilities	1,902,596	186,372	1,716,224	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	905	1,939,530	1,940,435
Subtotal General Expense	<u>14,705,022</u>	<u>1,177,816</u>	<u>13,527,206</u>	<u>14,705,022</u>
<b>Rent</b>	5,853,510	1,673,936	4,179,574	5,853,510
<b>Contracts</b>				
Consultant Services	237,810	52,572	185,238	237,810
Equipment Rental	279,491	39,445	240,046	279,491
Subtotal	<u>517,301</u>	<u>92,017</u>	<u>425,284</u>	<u>517,301</u>
<b>Other Expenses</b>				
ARCA Expenses/Dues	158,824	5,000	153,824	158,824
Legal	629,379	163,027	466,352	629,379
Insurance	1,099,946	437,176	662,770	1,099,946
Travel	580,274	95,490	484,784	580,274
Board of Directors	82,006	4,366	77,640	82,006
Staff Training	38,175	12,713	25,462	38,175
Community Training	25,000		25,000	25,000
Public Information	25,000		25,000	25,000
Subtotal	<u>2,638,604</u>	<u>717,772</u>	<u>1,920,832</u>	<u>2,638,604</u>
<b>Total Operating Expenses</b>	124,407,522	22,939,141	101,468,381	124,407,522
<b>Interest/Other Revenues</b>	(1,057,332)	(339,333)	(717,999)	(1,057,332)
<b>ICF SPA Service Fees Earned</b>	(101,152)	(47,788)	(53,364)	(101,152)
<b>Net Operating Expenses</b>	<u>123,249,038</u>	<u>\$ 22,552,020</u>	<u>\$ 100,697,018</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 September 30, 2024**

	<b>YEAR-TO-DATE ACTUAL EXPENDITURES COMPARISON</b>		<b>FISCAL YEAR PROJECTED EXPENDITURES COMPARISON</b>	
	<b>Current Year Expenses through (09/30/2024)</b>	<b>Prior Year Expenses through (09/30/2023)</b>	<b>FY2024/2025 Total Projected Expenses</b>	<b>FY2023/2024 Total Expenses (estimated)</b>
<b>Personnel</b>				
Salaries	\$ 14,873,744	13,980,066	\$ 73,149,523	\$ 63,335,579
Fringe Benefits	4,283,593	4,188,317	26,932,333	22,167,453
Temporaries	120,263	133,540	611,229	576,000
Subtotal Personnel	<u>19,277,600</u>	<u>18,301,923</u>	<u>100,693,085</u>	<u>86,079,032</u>
<b>General Expense</b>				
General Exp, Supplies & Tech	250,677	1,126,160	4,767,448	4,600,000
General Maint. & Construction	55,130	459,567	2,704,713	2,000,000
Equipment Purchases	-	916,093	985,031	1,551,103
Information Technology	310,790	207,349	775,259	1,447,379
Building Services	253,765		734,319	600,000
Postage	120,177	48,821	196,913	206,000
Utilities	186,372	67,390	1,902,596	230,000
Printing	-	10,324	28,307	54,500
Accounting/Audit/Tax Fees	-	5,750	60,000	76,300
Tuition Reimbursement				
LOC Expenses	-		610,000	
Policy/Projects/Miscellaneous	905		1,940,435	1,303,996
Subtotal General Expense	<u>1,177,816</u>	<u>2,841,454</u>	<u>14,705,022</u>	<u>13,459,670</u>
<b>Rent</b>	1,673,936	1,919,017	5,853,510	7,595,500
<b>Contracts</b>				
Consultant Services	52,572	16,625	237,810	1,426,000
Equipment Rental	39,445	70,238	279,491	463,250
Subtotal	<u>92,017</u>	<u>86,863</u>	<u>517,301</u>	<u>2,014,250</u>
<b>Other Expenses</b>				
ARCA Expenses/Dues	5,000		158,824	160,000
Legal	163,027	126,540	629,379	747,487
Insurance	437,176	741,142	1,099,946	993,570
Travel	95,490	84,258	580,274	674,500
Board of Directors	4,366	7,946	82,006	85,000
Staff Training	12,713		38,175	38,000
Community Training			25,000	
Public Information		75	25,000	25,000
Subtotal	<u>717,772</u>	<u>959,961</u>	<u>2,638,604</u>	<u>2,748,557</u>
<b>Total Operating Expenses</b>	22,939,141	24,109,218	124,407,522	111,897,009
<b>Interest/Other Revenues</b>	(339,333)	(394,025)	(1,057,332)	(1,774,268)
<b>ICF SPA Service Fees Earned</b>	(47,788)	(43,400)	(101,152)	(184,776)
<b>Net Operating Expenses</b>	<u>\$ 22,552,020</u>	<u>23,671,793</u>	<u>\$ 123,249,038</u>	<u>\$ 109,937,965</u>

11/1/2024 12:44



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: November 5, 2024  
TO: Board of Directors  
FROM: Dulce Morin  
RE: Contracts for Board Review

The November 12, 2024, Board meeting agenda includes the approval of contracts with the following nine (9) service providers.

### New or Revised Contracts

PY1643 Community Interface Services  
PY3543 Community Interface Services  
HQ1581 Pride Industries

### Renewals

H59119 Blessed Home Care  
HQ0119 First Choice Transportation  
HQ1133 Home of Guiding Hands (HGH) Transportation  
HQ1845 Open Arms Voc Serv Inc.  
HQ0887 Rancho Bernardo Day Program (RBDP)  
HQ1338 TG Transportation

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>	Community Interface Services 981 VALE TERRACE DR Vista CA 92084
<b>2</b>	<b>Vendor #:</b>	PY1643
<b>3</b>	<b>Type of Program:</b>	315 FMS-Fiscal Agent, 316 FMS Co-Employer, 317 FMS Fiscal/Employer Agent
<b>4</b>	<b>Scope of Work/Program Design:</b>	<p>FMS as Bill Payer: (also known as the Fiscal Agent model) A participant may choose this model of FMS provider when goods or services are purchased from a business. The FMS providing services in this capacity writes checks and pays for goods and services listed in the IPP. No employer/employee relationship exists between the FMS, the service provider, or the participant. The business is responsible to provide the items or workers and the FMS provider writes the check for the goods or services provided. The business maintains the employer/employee relationship with any workers and therefore is responsible for all applicable employment laws and taxes and to obtain appropriate insurances (i.e., worker's compensation).</p> <p>FMS as Co-Employer: A participant may choose this model if they want to share some of the employer roles and responsibilities with an FMS. While the FMS provider in this model is the employer of record, the participant maintains the ability to hire and terminate employees with input from the FMS provider. The FMS provider maintains the primary employer liability and required insurances. The FMS also assists by verifying provider qualifications and processing payroll.</p> <p>Participant as Sole Employer: (also known as the Fiscal/Employer Agent) A participant may choose this model if they want to be the direct employer of those providing services. The FMS providing services in this model assists the participant to abide by all applicable employment laws, verifies provider qualifications and processes payroll. The participant is required to obtain any necessary insurances related to employment (i.e., worker's compensation).</p>
<b>5</b>	<b>Program Capacity:</b>	3,000 participants per year

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name (name facility or program):</b>	Community Interface Services 981 Vale Terrace Dr., Vista, CA 92084
<b>2</b>	<b>Vendor #:</b>	PY3543
<b>3</b>	<b>Type of Program:</b>	Participant-Directed Services (PDS) - 099 General Self-Directed (SD) Support Services
<b>4</b>	<b>Scope of Work/Program Design:</b>	The FMS shall confirm that providers of General SD Supports are eligible to provide Medicaid services per Welfare and Institutions Code, Division 9, Part 3. Regional centers shall fund PDS as two separate authorizations through service codes: • General SD Supports (service code 099, subcode “PDS”) • Fiscal Agent (service code 490). Those providing General SD Supports through PDS are not required to be vendored by a regional center. The rate for General SD Supports through PDS are the same as the rates for a General SD Supports vendor.
<b>5</b>	<b>Program Capacity:</b>	600 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 (per participant) x 600 (participants) = \$1,211,520 (maximum per year) x 5 years (contract length) = \$6,057,600.00 (amount was rounded up to \$6,100,000.00 to account for slight fluctuations)
<b>8</b>	<b>Term of Contract:</b>	November 15, 2024 – November 14, 2029
<b>9</b>	<b>Date of Initial Vendorization:</b>	TBD
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	None, new contracted service

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name (name facility or program):</b>	PRIDE Industries 7710 Hazard Center Drive, San Diego, CA 92123
<b>2</b>	<b>Vendor #:</b>	HQ1581
<b>3</b>	<b>Type of Program:</b>	952 SEP-IP, Sub code: PIPW
<b>4</b>	<b>Scope of Work/Program Design:</b>	PRIDE Industries is the employer of record and supports participants with ensuring their timecards are accurate and completed timely, distributes paychecks via direct deposit or mailed check, and provides paystubs and tax documentation. This ensure the participant is supported with all employment needs. PRIDE Industries follows all local, state, and federal regulations. PRIDE Industries will utilize the vendor number HQ1581, sub code PIPW to offer this service.
<b>5</b>	<b>Program Capacity:</b>	150 PIP's over 5 years:  Year 1: 20 Year 2: 25 Year 3: 30 Year 4: 35 Year 5: 40  150 PIP's x \$20,000 = \$3,000,000
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	Paid Internship Program (PIPW) is: \$1.00 Variable
<b>7</b>	<b>Total Potential Compensation:</b>	3,000,000.00
<b>8</b>	<b>Term of Contract:</b>	11/18/2024 – 11/17/2029
<b>9</b>	<b>Date of Initial Vendorization:</b>	10/23/2024
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	Addition: Employer of Record

Document2

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	Blessed Home Care 633 Via Armado Chula Vista, Ca 91910
<b>2</b>	<b>Vendor #:</b>	H59119
<b>3</b>	<b>Type of Program:</b>	880 Transportation Additional Component
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency supports adults with developmental disabilities by transporting them to various programs throughout Central and Southern San Diego County.
<b>5</b>	<b>Program Capacity:</b>	SDRC usually limits the number of individuals served by a transportation company to 300. This agency currently has open authorizations for 14 individuals and is small operator.
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	0-7 Miles (based on one-way trip length) - \$19.22 for a round trip (\$9.61 if one-way trip is provided) 7-14 Miles (based on one-way trip length) - \$21.26 for a round trip (\$10.62 if one-way trip is provided) 14 + Miles (based on one-way trip length) - \$23.34 for a round trip (\$11.67 if one-way trip is provided)
<b>7</b>	<b>Total Potential Compensation:</b>	Last FY total compensation was \$81,838.66. Expected growth not to exceed 7% year over year. Estimated total compensation not to exceed \$500,000.00.
<b>8</b>	<b>Term of Contract:</b>	November 12, 2024 through November 11, 2029
<b>9</b>	<b>Date of Initial Vendorization:</b>	September 26, 1995
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	None

Document1



## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	First Choice Transportation 322 Vista Marazul Oceanside, Ca 92057
<b>2</b>	<b>Vendor #:</b>	HQ0119
<b>3</b>	<b>Type of Program:</b>	875 Transportation Company
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency supports adults with developmental disabilities by transporting them to various programs throughout North San Diego County.
<b>5</b>	<b>Program Capacity:</b>	SDRC usually limits the number of individuals served by a transportation company to 300. This agency currently has open authorizations for 184 individuals.
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	\$16.94 per ambulatory trip per day \$19.81 per non ambulatory trip per day \$21.95 per aide hour
<b>7</b>	<b>Total Potential Compensation:</b>	Last FY total compensation was \$2,281,342.42. Expected growth not to exceed 7% year over year. Estimated total compensation not to exceed \$5,052,974.22.
<b>8</b>	<b>Term of Contract:</b>	November 12, 2024 through November 11, 2026
<b>9</b>	<b>Date of Initial Vendorization:</b>	June 9, 2003
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	SDRC is conducting an Audit of this Vendor

Document1

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	Home of Guiding Hands (HGH) Transportation 1908 Friendship Dr El Cajon, CA 92020
<b>2</b>	<b>Vendor #:</b>	HQ1133
<b>3</b>	<b>Type of Program:</b>	875 Transportation Company
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency supports adults with developmental disabilities by transporting them to various programs throughout Central and East San Diego County.
<b>5</b>	<b>Program Capacity:</b>	SDRC usually limits the number of individuals served by a transportation company to 300. This agency currently has open authorizations for 185 individuals.
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	\$16.94 per ambulatory trip per day \$19.81 per non ambulatory trip per day \$23.26 per aide per hour
<b>7</b>	<b>Total Potential Compensation:</b>	Total compensation was FY 24 was \$1,645,727.45. Expected growth not to exceed 7% year over year. Estimated total compensation not to exceed \$10,126,639.15.
<b>8</b>	<b>Term of Contract:</b>	November 12, 2024 through November 11, 2029
<b>9</b>	<b>Date of Initial Vendorization:</b>	March 25, 2015
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	

Document1

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	Open Arms Voc Serv Inc 3211 Celinda Dr Carlsbad, Ca 92008
<b>2</b>	<b>Vendor #:</b>	HQ1845
<b>3</b>	<b>Type of Program:</b>	880 Transportation Additional Component
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency supports adults with developmental disabilities by transporting them to their program in the North County.
<b>5</b>	<b>Program Capacity:</b>	SDRC usually limits the number of individuals served by a transportation company to 300. This agency currently has open authorizations for 25 people, but program design says they can go to 200.
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	0-7 Miles (based on one-way trip length) - \$19.22 for a round trip (\$9.61 if one-way trip is provided) 7-14 Miles (based on one-way trip length) - \$21.26 for a round trip (\$10.62 if one-way trip is provided) 14 + Miles (based on one-way trip length) - \$23.34 for a round trip (\$11.67 if one-way trip is provided) Additional Supplement for Non Amb clients.
<b>7</b>	<b>Total Potential Compensation:</b>	Last FY total compensation was \$115,204.12. Expected growth not to exceed 7% year over year. Estimated total compensation not to exceed \$708,884.45.
<b>8</b>	<b>Term of Contract:</b>	November 12, 2024 through November 11, 2029
<b>9</b>	<b>Date of Initial Vendorization:</b>	April 28, 2020
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	None

Document1

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	Rancho Bernardo Day Program (RBDP) 16496 Bernardo Ctr Dr, 310 San Diego, Ca 92128
<b>2</b>	<b>Vendor #:</b>	HQ0887
<b>3</b>	<b>Type of Program:</b>	880 Transportation Additional Component
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency supports adults with developmental disabilities by transporting them to RBDP program in San Diego Proper.
<b>5</b>	<b>Program Capacity:</b>	SDRC usually limits the number of individuals served by a transportation company to 300. This agency currently has open authorizations for 23 individuals. Program design indicates they only serve approximately 30 people
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	0-7 Miles (based on one-way trip length) - \$19.22 for a round trip (\$9.61 if one-way trip is provided) 7-14 Miles (based on one-way trip length) - \$21.26 for a round trip (\$10.62 if one-way trip is provided) 14 + Miles (based on one-way trip length) - \$23.34 for a round trip (\$11.67 if one-way trip is provided) Additional Supplement for Non Amb clients.
<b>7</b>	<b>Total Potential Compensation:</b>	Open Auths for FY 25 estimate compensation would be \$135,024.72. Expected growth not to exceed Program Capacity year over year. Estimated total compensation not to exceed \$843,903.96.
<b>8</b>	<b>Term of Contract:</b>	November 12, 2024 through November 11, 2029
<b>9</b>	<b>Date of Initial Vendorization:</b>	December 6, 2010
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	None

Document1

## Contract Summary for Board of Directors Review/Approval

<b>1</b>	<b>Provider Name:</b>	TG Transportation 1473 S Orange Ave El Cajon, CA 92020
<b>2</b>	<b>Vendor #:</b>	HQ1338
<b>3</b>	<b>Type of Program:</b>	875 Transportation Company
<b>4</b>	<b>Scope of Work/Program Design:</b>	The services provided by this agency supports adults with developmental disabilities by transporting them to various programs throughout Central and East San Diego County.
<b>5</b>	<b>Program Capacity:</b>	SDRC usually limits the number of individuals served by a transportation company to 300. This agency currently has open authorizations for 181 individuals.
<b>6</b>	<b>Rate (hourly/daily/monthly):</b>	\$16.94 per ambulatory trip per day \$19.81 per non ambulatory trip per day
<b>7</b>	<b>Total Potential Compensation:</b>	Last FY total compensation was \$1,155,986.89. Expected growth not to exceed 7% year over year. Estimated total compensation not to exceed \$7,113,123.43.
<b>8</b>	<b>Term of Contract:</b>	November 12, 2024 through November 11, 2029
<b>9</b>	<b>Date of Initial Vendorization:</b>	June 12, 2018
<b>10</b>	<b>Significant Changes from Previous Contract:</b>	None

Document1



San Diego Regional Center  
4355 Ruffin Road, San Diego, CA 92123  
658-576-2996 / [www.sdrc.org](http://www.sdrc.org)

Serving individuals with developmental disabilities in San Diego and Imperial Counties

## MEMORANDUM

**DATE:** November 5, 2024  
**TO:** Members, SDRC Legislation Committee  
**FROM:** Norma Ramos, Chair, Legislation Committee  
**RE:** November 12, 2024, Legislation Committee Agenda

The SDRC Legislation Committee will meet on Tuesday, November 5, 2024 at **10:00 a.m.** in the 3<sup>rd</sup> Floor Conference Room (Suite 300) at the Ruffin Road Office Building. The following is the proposed agenda:

1. Call to Order
2. Chair's Report
3. Presentation on Legislative Outcomes by Tony Anderson
4. Announcements
5. Adjournment



## San Diego-Imperial Counties Developmental Services, Inc.

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

Date: October 25, 2024

To: Members, SDICDSI Personnel Committee  
Virginia Bayer  
James Gonzalez  
Julie Randolph  
Kimberly Rucker

From: Laura Oakes, Chair

Subject: Personnel Committee Meeting

The next Personnel Committee meeting will be held on Tuesday, November 12, 2024 at 10:00 a.m. This meeting will be in **Suite 203** or via Zoom if you prefer. The proposed agenda is attached.

If you have any questions or are unable to attend the meeting, please contact Christine Lux-Whiting at (858) 503-4441.

xc: Mark Klaus  
Kimberly Steitz  
Christine Lux-Whiting



# **San Diego-Imperial Counties Developmental Services, Inc.**

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

Personnel Committee Meeting  
Raymond M. Peterson, M.D. Office Building  
4355 Ruffin Road, San Diego, CA 92123

## **In-Person/Virtual Meeting**

November 12, 2024

10:00 A.M. – 11:00 P.M.

### AGENDA

1. Call to Order
2. Approval of the October 2024 Meeting Minutes (Enclosure 1)
3. Delinquent Performance Reviews
4. New Hire, Exit, and Turnover Reports (Enclosure 2)
5. Regional Center Comparative Turnover
6. Proposition 32 – Minimum Wage
7. Holiday Schedule 2025
8. Additional Positions FY 24/25
9. Other Business

Serving Individuals with Developmental Disabilities





# San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 (858) 576-2996 www.sdrc.org

## PERSONNEL COMMITTEE MINUTES

October 8, 2024

**Members Present:** Laura Oakes (Chair), Virginia Bayer, Dave Hadacek, Julie Randolph, Kimberly Rucker  
**Members Absent:** James Gonzalez  
**Staff Present:** Christine Lux-Whiting, Gabriella Ohmstede, Tami West Harman

1. **CALL TO ORDER**  
Laura Oakes called the meeting to order.
2. **MEETING MINUTES**  
The minutes from the last Personnel Committee meeting held in September 2024 were approved.
3. **DELINQUENT EMPLOYEE PERFORMANCE REVIEWS**  
There were 18 performance reviews overdue by 60 days, excluding employees on leave. There was a motion that the timely completion of performance reviews be reflected in the manager's performance evaluation.
4. **NEW HIRE, EXIT AND TURNOVER REPORTS**  
For September 2024, there were 25 new hires and 14 departures. It was suggested to fine-tune the reason for leaving for another job on the exit interview survey.
5. **TUITION REIMBURSEMENT**  
We will reintroduce the program that was in place prior to the DDS program.
6. **HANDBOOK REVISION 2025**  
The Employee Handbook will be reviewed for needed updates in 2025.
7. **DDS AUDIT**  
The DDS audit was completed for FY ending 2022. There were no findings related to HR.
8. **OTHER BUSINESS**  
The meeting was adjourned by Laura Oakes.

Respectfully Submitted,

Christine Lux-Whiting  
Director, Human Resources

# SD-ICDSI NEW HIRE REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

<u>DOH</u>	<u>TITLE</u>	<u>UNIT/DEPT</u>
10/28/2024	Service Coordinator	Unit 9
10/28/2024	Service Coordinator	Unit 44
10/28/2024	Service Coordinator	Unit 12
10/28/2024	Service Coordinator	Unit 44
10/28/2024	Service Coordinator	Unit 34
10/28/2024	Service Coordinator	Unit 3
10/24/2024	Administrative Support Assistant	ISG
10/14/2024	Service Coordinator	Unit 11
10/7/2024	Administrative Support Assistant	SISG
10/7/2024	Director, Clinical Services	Clinical
9/30/2024	Service Coordinator	Unit 46
9/30/2024	Service Coordinator	Unit 30
9/30/2024	Service Coordinator	Unit 18
9/30/2024	Service Coordinator	Unit 46
9/30/2024	Service Coordinator	Unit 5
9/16/2024	Service Coordinator	Unit 46
9/16/2024	Service Coordinator	Unit 30
9/16/2024	Service Coordinator	Unit 18
9/16/2024	Service Coordinator	Unit 46
9/16/2024	Service Coordinator	Unit 5
9/16/2024	Service Coordinator	Unit 44
9/16/2024	Service Coordinator	Unit 45
9/16/2024	Service Coordinator	Unit 43
9/16/2024	Service Coordinator	Unit 12
9/16/2024	Service Coordinator	Unit 52
9/16/2024	Service Coordinator	Unit 16
9/16/2024	Service Coordinator	Unit 18
9/16/2024	Service Coordinator	Unit 18
9/9/2024	Service Coordinator	Unit 21
9/9/2024	POS Auth. Specialist	Business Svcs.
9/9/2024	Service Coordinator	Unit 44
9/9/2024	Service Coordinator	Unit 52
9/9/2024	Service Coordinator	Unit 9
9/9/2024	Service Coordinator	Unit 44
8/19/2024	Service Coordinator	Unit 12
8/19/2024	Service Coordinator	Unit 5

## SD-ICDSI NEW HIRE REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

8/19/2024	Application Analyst	IT
8/19/2024	Application Analyst	IT
8/12/2024	Service Coordinator	Unit 26
8/12/2024	Service Coordinator	Unit 52
8/12/2024	Service Coordinator	Unit 55
8/5/2024	Service Coordinator	Unit 13
8/5/2024	Service Coordinator	Unit 41
8/5/2024	Service Coordinator	Unit 53
8/5/2024	Service Coordinator	Unit 54
8/5/2024	Service Coordinator	Unit 46
8/5/2024	Service Coordinator	Unit 53
8/5/2024	Service Coordinator	Unit 46
8/5/2024	Service Coordinator	Unit 46
8/5/2024	Service Coordinator	Unit 1
7/29/2024	Service Coordinator	Unit 46
7/29/2024	Service Coordinator	Unit 48
7/29/2024	Service Coordinator	Unit 52
7/29/2024	Service Coordinator	Unit 35
7/29/2024	Service Coordinator	Unit 54
7/29/2024	Service Coordinator	Unit 34
7/22/2024	Service Coordinator	Unit 41
7/15/2024	Service Coordinator	Unit 22
7/15/2024	Service Coordinator	Unit 16
7/15/2024	Service Coordinator	Unit 12
7/15/2024	Service Coordinator	Unit 46
7/15/2024	Administrative Support Assistant	KMSG2
7/15/2024	Service Coordinator	Unit 44
7/15/2024	Service Coordinator	Unit 52
7/15/2024	Service Coordinator	Unit 7
7/15/2024	Service Coordinator	Unit 52
7/8/2024	Service Coordinator	Unit 13
7/8/2024	Service Coordinator	SB Float
7/8/2024	Service Coordinator	Unit 18
7/8/2024	Service Coordinator	Unit 22
7/8/2024	Service Coordinator	Unit 29
7/8/2024	Service Coordinator	Unit 20
7/8/2024	Service Coordinator	Unit 49

# SD-ICDSI NEW HIRE REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

7/8/2024	Service Coordinator	Unit 11
7/8/2024	Service Coordinator	Unit 11
7/1/2024	Financial Analyst	Business Svcs.
7/1/2024	Administrative Support Assistant	Intake Supp. Group
7/1/2024	Administrative Support Assistant	Intake Supp. Group
7/1/2024	Service Coordinator	Unit 3
7/1/2024	Service Coordinator	Unit 45
7/1/2024	Service Coordinator	Unit 52
7/1/2024	Service Coordinator	Unit 45



# SD-ICDSI EXIT REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

<u>DOT</u>	<u>TERM REASON</u>	<u>DOH</u>	<u>LENGTH OF SERVICE</u>	<u>TITLE</u>
10/31/2024	Personal	3/8/2021	3 years, 7 months	SC
10/31/2024	Another job	10/10/2022	2 years, 0 months	SC
████████	████████	████████	████████	████████
10/24/2024	Personal	6/6/2022	2 years, 4 months	SC
10/24/2024	Another job	5/20/2024	0 years, 5 months	SC
10/21/2024	Another job	9/30/2024	21 days	SC
10/17/2024	Another job	2/27/2023	1 year, 8 months	SC
████████	████████	████████	████████	████████
████████	████████	████████	████████	████████
10/10/2024	Another job	7/6/2021	3 years, 3 months	Staff Psych
10/10/2024	Another job	8/14/2023	1 year, 2 months	Staff Psych
10/10/2024	Moving	10/10/2022	2 years, 0 months	SC
████████	████████	████████	████████	████████
████████	████████	████████	████████	████████
10/4/2024	Another job	3/13/2023	1 year, 7 months	SC
10/4/2024	Personal	6/28/2021	3 years, 3 months	PM
10/3/2024	Another job	4/4/2022	2 years, 6 months	SC
9/27/2024	Personal	7/1/2019	5 years, 3 months	CPS
9/27/2024	Personal	3/31/2008	16 years, 6 months	SC
████████	████████	████████	████████	████████
████████	████████	████████	████████	████████
████████	████████	████████	████████	████████
████████	████████	████████	████████	████████
████████	████████	████████	████████	████████
9/20/2024	Another job	4/15/2019	5 years, 5 months	SC
9/13/2024	Another job	3/14/2022	2 years, 5 months	CNS
9/12/2024	Another job	2/26/2024	0 years, 6 months	POSSDC
9/12/2024	Another job	11/29/2021	2 years, 9 months	SC
9/12/2024	Moving	9/13/2021	3 years	SC
9/11/2024	Moving	12/6/2021	2 years, 11 months	SC
████████	████████	████████	████████	████████
8/30/2024	Unknown	8/28/2023	1 year	SC
8/30/2024	Another job	8/9/2021	3 years, 1 month	SC
8/29/2024	School	8/7/2023	2 years	SC
8/29/2024	Moving	3/6/2023	1 year, 5 months	SC
8/16/2024	Another job	8/5/2024	1 week, 4 days	SC
8/9/2024	Another job	2/1/2021	3 years, 6 months	SC

## SD-ICDSI EXIT REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

<u>DOT</u>	<u>TERM REASON</u>	<u>DOH</u>	<u>LENGTH OF SERVICE</u>	<u>TITLE</u>
8/9/2024	Personal	10/10/2001	22 years, 10 months	SC
8/2/2024	Another job	5/6/2024	0 years, 3 months	SC
8/2/2024	School	8/15/2022	2 years	SC
8/1/2024	Another job	4/13/2020	4 years, 3 months	SC
7/31/2024	Another job, Lic. Hrs.	9/17/2018	5 years, 10 months	SC
7/31/2024	Retirement	7/16/1990	34 years	Hir. Mgr.
7/31/2024	Retirement	6/28/1979	45 years. 1 month	Mgr. SD
7/31/2024	Retirement	7/6/1999	25 years	PM
7/26/2024	Another job	4/13/2009	15 years, 3 months	HDSC
7/26/2024	Moving out of state	12/16/2019	4 years, 7 months	SC
7/26/2024	School	8/29/2022	1 year, 11 months	SC
7/16/2024	Retirement	6/29/1998	26 years, 1 month	ASA
7/12/2024	Retirement	7/1/2019	5 years	Trust.Asst.
7/5/2024	Retirement	1/8/2002	22 years, 6 months	PM





**SD-ICDSI TURNOVER REPORT**  
**July 1, 2024 - June 30, 2025**

	Average Number of Employees	New Job, School, Personal, Other	Moved, Retirement, Death	Total Number of Departures	Year to Date Turnover %
July	933	3	7	10	
August	949	9	1	10	
September	955	12	2	14	
October	945	16	1	17	
November					
December					
January					
February					
March					
April					
May					
June					
<b>Totals</b>	946	40	11	51	5.4%



**San Diego-Imperial Counties Developmental Services, Inc.**

## **2025 Holiday Schedule**

Wednesday	January 1, 2025	New Year's Day
Monday	January 20, 2025	Martin Luther King, Jr. Day
Monday	February 17, 2025	Presidents' Day
Monday	May 26, 2025	Memorial Day
Friday	July 4, 2025	Independence Day
Monday	September 1, 2025	Labor Day
Tuesday	November 11, 2025	Veterans Day
Thursday	November 27, 2025	Thanksgiving Day
Friday	November 28, 2025	Agency Day
Wednesday	December 24, 2025	Christmas Eve
Thursday	December 25, 2025	Christmas Day

One (1) employee-selected holiday per calendar year for a total of twelve (12) holidays.



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

October 31, 2024

To: Members, SDICDSI Client Advisory Committee  
Timothy Riemann  
Kim Rucker  
Elmo Dill  
Mark Uyeda

From: Erik Rascon, Chair

Re: November 11, 2024: Client Advisory Committee Meeting

There will be a meeting of the Client Advisory Committee held at **11:00am on Tuesday November 11, 2024; location at Ruffin Road Office Conference 203.**

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. Update on local self-Advocacy Groups:
  - a. St. Mad's
  - b. Noah Homes (Tim)
  - c. Imperial Valley (Peter and Eric)
5. Update on San Diego People First Advocacy Group: Viri
6. Update on Imperial Valley People First Group: Eric
7. ARCA CAC update-Viri
8. CAC-SDRC Website
  - a. Update on website links/info
  - b. TEAM PHOTO

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

October 10, 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 11:15 am.

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

### **Presentation:**

Lynee Allen from Special Olympics presented. She provided the premise of the program, activities, upcoming events and registration process.

### **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, Date TBD.

**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.

**ARCA CAC Update:** Viri provided recent updates and she continues to represent SRDC.

**Other:**

- Active Shooter Training
- Voter Seminar Info
- Project Safe Presentation on October 28<sup>th</sup>; flyer to come.
- SDRC Website: CAC link to come.
- Jobtober being held on 10/9/2024.

Next meeting will be November 11, 2024  
Meeting adjourned at 11:50 am.

cc: Dave Hadacek, SDICDSI Chair  
Mark Klaus