

INTRODUCTION TO THE SELF-DETERMINATION TRANSITION PROCESS

Created by Expand Yu LLC





YOUR PLANNING TEAM

If someone wanted to write a story about you, who would you want them to talk to? Who would have the best things to say?

People on your team can contribute directly during planning meetings, or indirectly via email or letters, or surveys prepared by your facilitator.

Friends &
Family

RC
Coordinators,
Social Workers

Service
Providers

Teachers,
Tutors

Doctors,
Therapists

*anyone who
knows you well*



ENTERING SELF-DETERMINATION OVERVIEW

STAGE	STAGE	STAGE	STAGE	STAGE
01 UNDERSTANDING SELF-DETERMINATION	02 CREATING THE PERSON-CENTERED PLAN	03 GETTING A CERTIFIED BUDGET	04 CREATING A SPENDING PLAN	05 ONBOARDING WITH AN FMS
Learn about the <i>possibilities</i> and the responsibilities of the Self-Determination Program.	Point out the most important <i>problems</i> and dreams you want to work on in SDP.	Work with your Regional Center to figure out how much money you will be able to spend in SDP.	Decide what supports and services you want to spend your money on in SDP.	Sign up with your FMS of choice and get all your supports and services signed up too.
				

SDP TRANSITION TIMELINES



PCP Creation

Planning & creating the PCP document with your IF



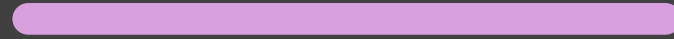
Certified Budget

Your Regional Center team creates a budget according to your needs and goals



FMS Onboarding

Find and sign up with an FMS agency and get your service providers signed up and ready to work.



Spending Plan

You and your IF will create a plan to make the most of your budget funds to meet your needs in SDP



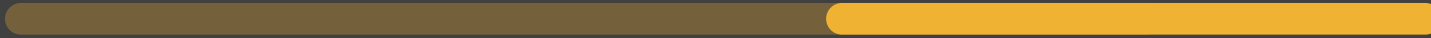
Finalize SDP Start

Complete final paperwork with FMS and Regional Center for your SDP Start Date.



Finding Providers

Identifying providers in your community that can meet your needs



SDP IPP

Your Regional Center team will incorporate your PCP and spending plan into your new IPP to prepare for your first year of SDP



M1

M2

M3

M4

M5

M6

M7

M8

M9



THE PERSON-CENTERED PLANNING PROCESS

STEP 1

PRE-PLANNING

- ❖ Understanding your current life and services & supports.
- ❖ Collecting information from your support team, friends, and family.
- ❖ Learning what is urgent and what is important.

1 – 2 Weeks

STEP 2

PLANNING SESSIONS

- ❖ Diving deeply into the most important issues and dreams
- ❖ Creating clear goals for your first year of Self-Determination

2 – 5 Weeks

STEP 3

PLAN CREATION

- ❖ I bring together all the information we collected into a single document: your Person-Centered Plan

1 – 2 Weeks

STEP 4

PLAN REVISIONS

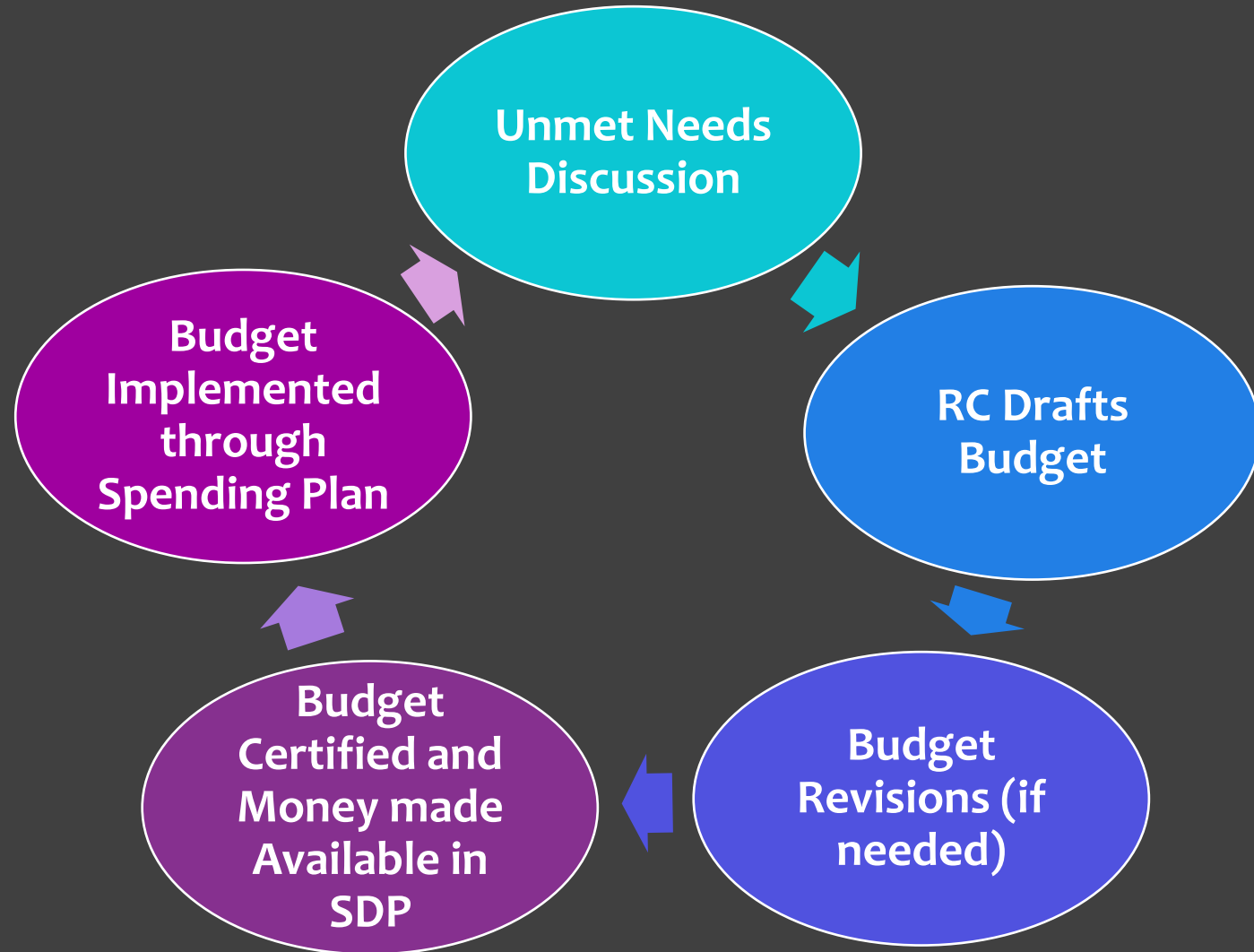
- ❖ You and your support team review the document and provide feedback and ideas for how it can be better
- ❖ I make changes to the plan to make it better

1 – 3 Weeks



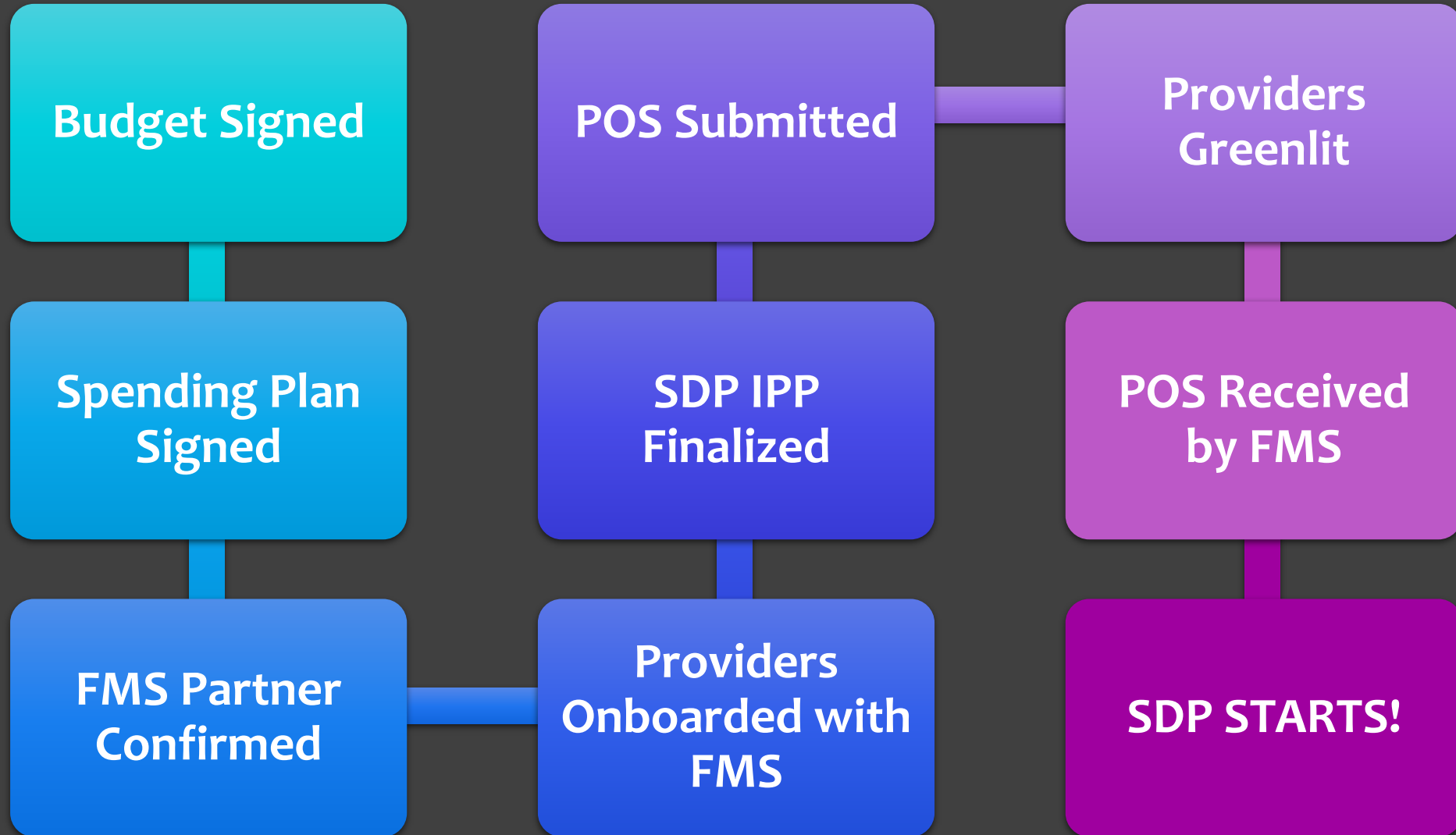
THE BUDGET CYCLE

This cycle is repeated each SDP year, or if there are changes of circumstance and new unmet needs.





FINALIZING SELF-DETERMINATION





SELF-DETERMINATION FMS MODELS



Bill Payer

- No Direct Employees
- Hire businesses, agencies, or independent contractors
- No additional costs.



Co-Employer

- The FMS hires employees you choose
- Your FMS handles payroll, taxes, benefits, insurance, etc.
- Employer burden must be factored into spending plan.



Sole-Employer

- You hire employees yourself
- Your FMS handles payroll and taxes
- You may need to choose benefits and worker's comp. insurance
- Employer burden must be factored into spending plan.
- Most customizable
- Most responsibility



YOUR TRANSITION SUPPORT FUNDING

Regional Center Funded Supports for Starting Self-Determination

Person-Centered Planning Services
(up to \$1000)

Transition Supports
(up to 40 hours at **DDS set rate**)

Pre-Planning

Planning Meetings

Document Creation

Individual Budget

Spending Plan

FMS & Provider Onboarding

ONGOING SDP FACILITATION (AFTER STARTING SDP)

- After starting Self-Determination it is recommended that you have ongoing support from a trained Independent Facilitator for at least the first 1 – 2 years of SDP
- Your Independent Facilitator can help with:
 - Changes to your life & Person-Centered Plan
 - Changes in Providers or the amount of money assigned to them in your Spending Plan
 - Updates to your Budget due to changes in your needs
 - **Renewal for Year 2 of SDP** which includes a new Budget, new Spending Plan, and new SDP IPP
- Ongoing support from an IF is paid through the SDP Spending Plan.
 - Cost varies between different Facilitators.
 - Expand Yu charges \$120 / hour for ongoing facilitation.

ADDITIONAL TIPS

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ON A WAITLIST FOR PCP & SDP TRANSITION SUPPORTS?

SOME THINGS YOU CAN DO WHILE YOU WAIT

- Make a list of the people, places, activities, and things that you love.
- Make a list of people in your life who could provide valuable insights about you, your skills, interests, passions, potential, and support needs.
- Consider how you work best with other people, whether that includes meetings where you can see the other person's face, via phone, via text, etc.
- Get a copy of your most recent IPP and ask for an Expenditure Report of what the Regional Center has spent in services for you during the last 12 months
- Ask your Regional Center coordinator if there are “generic resources” you could be using. Your coordinator or service providers like ILS or SLS workers can help you apply or ask for services.
- If your needs are not being met, ask your coordinator for an IPP meeting as soon as possible and ask that they address your needs with the solutions at their disposal.
 - Even if these solutions are not ideal, if they do not cause harm, they are often better than having no supports at all.
 - Plus having these in place makes the budget process easier later.
 - Make sure your needs are properly recorded in your IPP document!
 - Even if they can't meet your needs, having it recorded that they were requested helps us later on.
- If you are requesting supports that are related to medical needs, make sure you request them from your health insurance provider or Medi-Cal.
 - If they say no, ask them to send you a denial letter.

PRE-PLANNING CHECKLIST

SOME THINGS TO CONSIDER BEFORE STARTING TO PLAN

- **What kind of plan facilitator do you want?**
 - Is there a particular style or approach you want?
 - Are certain personality traits or is cultural background important to you?
 - What do you need the most support for?
- **Why do you want to create a person-centered plan?** What do you hope this plan does for you?
- What's the most important thing for someone to know about you?
- Who do you want involved in your planning process?
 - Who do you think can teach others about you, your needs, your goals, your potential, etc.
 - What is the best way to involve them? Is it during meetings? Is it sending them questions via email? Is it private interviews? Etc.
- How do we ensure the participant is at the center of the planning process?
 - How much do they WANT to be involved?
 - What accommodations do they need in order to participate?
 - How do they communicate best? (Remember, behavior is communication!)
- What is the best way for the participant to make decisions about their plan (or their life)?
 - How do they understand information best?
 - What is the best way to present choices?
 - When are the best and the worst times for them to make decisions?
- What would make the planning process a fun and positive experience?
- Is there anything off-limits? (People, topics, events, etc.)

DETERMINING IF EXPAND YU IS THE RIGHT FIT FOR YOU

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ABOUT MY PERSPECTIVE





MY STYLE OF TRANSITION SUPPORTS

The best results come from working with someone who aligns with your needs. A lot about this process is customized to individual participants, but here is a bit about **my style and approach**.

Communication	Person-Centered Planning	Collaboration	Budget / Spending
<ul style="list-style-type: none">▪ Our work is fully remote▪ Scheduled meetings via MS Teams or by phone▪ Other communication by email or text message▪ Avoid unscheduled phone calls (please leave a voicemail)	<ul style="list-style-type: none">▪ Centered around the participant's interests▪ Holistic – looks at all aspects of life and how they interact▪ Finding solutions that address multiple needs at once▪ Maximizing the participant's autonomy▪ Zooming in on what will make the biggest difference in the next 12 months	<ul style="list-style-type: none">▪ I am your partner in advocacy, I can provide language, context, and experience but RCs listen most when clients and their families speak up rather than to a third party▪ I am a consultant and a project manager first and foremost – my role is to guide and prompt▪ I can help with SDP paperwork, but you must review and sign▪ Keep me in the loop! I can't address what I can't see.	<ul style="list-style-type: none">▪ Advocating for participants to receive fair budgets that address their needs▪ “How do we make the most out of limited funds with the new flexibility of SDP?”▪ As much as possible, let's tackle the root challenges rather than trying to spread our funds too thin.▪ How do SDP funds impact use of personal funds?
<p>I cannot directly assist with obtaining generic resources like IHSS, SSI, SSDI, Medi-Cal, CSS, or services through the IEP.</p>			

MORE TO COME

This guidebook is a work in progress.

If there are additional graphics or diagrams you would like to see added, please contact Expand Yu at SDP@expandyu.com

