

**ATTENDEES**

JOHN DECKER  
ZACH HORCH  
ROBERT LEVY  
HERMAN KOTHE  
MECHELLE JOHNSON  
BETSY KATZ  
JACQUIE FOSS  
JOHNNY XIONG

KATHERINE WESTON  
LISA COOLEY  
MARCUS HUFF  
LAVONNE HUFF  
NORMA VIDAURRETA  
SONYA BINGAMAN  
TRACY BROWN  
DAPHNE CHAKURIAN

JENNIFER BLOOM  
KAREN MULVANY  
KELSEY HANDCOCK  
SERGIO PINTO  
DAVID LOPEZ  
TANIA DESHA

**Group Updates**

**Herman’s Group “Group #1” –**

- Benefit of reflecting on end of life care and future life planning. Dialogue with appropriate language and competency to discuss with clients the nature of the topic and serve the purpose. Changed learning objective to include such language.

**Sub Topics:**

1. What is the definition of cultural competency.
2. Stages of grief that individuals go through with dealing with loss and end of life how to address emotional sensitivity

**Discussion Topics**

1. Who is included in the conversation? Parent/client/vendor? Require permission from family to discuss the nature of the topic.
2. Recognize decision maker
3. Start where the family is at – they made decline
4. Testimonials/statistics

**Comments**

- Betsy – Commends Herman for the topics and holding the meeting. This particular learning objective requires a lot of sensitivity to the topic at hand. It was interesting trying to do research on this; there was more information on this topic than she thought. She would like to see more research-based articles and grounded research. There’s a lack of information on how to prepare a case manager or service coordinator to do this type of work. She found some theses from some colleges that talked about “What a family needs from you”. We’ll need to extrapolate on preparedness so they’re comfortable and anticipate the different questions/issues/emotions.

**Jennifer’s Group “Group #2” –**

- Articulate Early Planning Succession. Brainstorming free flow of ideas.

**Discussion Topics**

1. What kind of training formats we would want to look at? Make a video outlining pros/cons, workshops individual training sessions.
2. Record keeping skills, religious considerations and more. Norma spoke about family dynamics and cultural beliefs and norms. So barriers was brought up as well.

Researching barriers and the common types that would be brought up to this type of topic. There's an awful stigma that should the caregiver pass away, that ALTA will take the client away from said family.

3. Collection of videos or create our own. What are we asking families to do; really define what we are asking them. Develop partnerships with others; provide training on support groups, visuals/videos, or a checklist.
4. How early should we begin these discussions? The earlier the better. With early planning it helps normalize the topic. It gives the hope that "1 day" they'll be comfortable talking about this with the case manager/service coordinator.

### **Comments**

- Phone interview from parent and what she would like to see – was helpful; talked about more about as a parent you really think about what would make your child or loved one feel more comfortable after you're gone. Person centered planning concepts. The parent has things written down for her son.
- Sonya – wellness journal; doctor's visits, medical information and various other medical like documents; the purpose was if the individuals were moving from 1 care giver to another. Something to hand to the successor so that the information would belong to the person so families would have information sheets.
- John and Karen really enjoyed the Wellness Journal it was something that was used in the past and maybe something we should look at bringing back.
- Michael Pierce – developed an online app – Best Idea – a record keeping app that allows control of document flow.

### **Johnny's Group "Group #3" –**

#### **Discussion Topics**

1. Having a short video 2-3 various settings being mindful of the information in them.
2. What the closure of the developmental sitters what will the RC's do?
3. Use or develop new videos from previous RC's resources.
4. Short video clips of different settings to show SC's a different style of learning and different visuals.
5. Self Determination program – CFP centered traditional levied
6. Who would be doing the day to day needs, providing transportation; things of that nature, how to incorporate this into the videos.
7. Having/developing a brochure
8. Exploring housing services

#### **Comments**

- Lisa Cooley – housing options who will go through caregiver succession; expanding a housing model in Santa Rosa? Expansion of sweet water? – It's a complicated discussion per Jacquie Foss and John Decker.
- Marcus & Lavonne – Stabilization – how much time does the SC have from obtaining a new client to understanding the current circumstances of a home. A Plan B in the event that CFP fails; some sort of "transition home".

**Tracy's Group "Group #4" –**

**Discussion Topics**

1. POA
2. Planning teams around conservatorship and what that looks like; there's a lot of legal lingo and things to understand. Look at how we can convey that people can understand to make an informed decision. Have a discussion around the conservatorship. What are alternate options outside that need.
3. CalABLE and special needs trust – *kelsey's* office gets a lot of calls about this topic; they are putting this wheelhouse in *Kelsey's* lap; she will be looking into it.
4. SMEE – Create some sort of outline; what is the imperative information to begin these discussions at the earliest ages.
5. Resources for housing options and future options for developmental options.
6. Input from families to know what's important; the 5W's

**Comments**

- There are families ready to discuss this topic while there are families that are going to be offended about this topic. Find ways so that the SC's are able to discuss the topic while being mindful and following the lead of the training that will be put forth.
- Our goal is to create a tool or video with real life situations; tools for sc's to share with clients and family to have input on their future. (end of life planning)
- Tania – SLS – set up housing with clients once they become older and less mobile; or examples of circumstances for challenges and barriers especially in the family system. (IHLS – could affect the family living situation) Some parents aren't prepared to have the discussion because they believed they'd outlive their children.
- Sergio mentioned – grief counselors