Alta California
Regional Center

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916-978-6400

Self-Determination Advisory Committee Meeting (SDAC)
Wednesday, September 9, 2026
1 to 3 p.m.
Minutes

Alta California Regional Center (ACRC)

Members:	Present	Absent	
Benita Shaw, FA (Co-Chair)	x		
Carmen Delgado, FA	x		
Kelsey Handcock, DRC	x		
Margaux De Leon, FA	x		
Lisa Cooley, SA (Chair)	x		
Tanishia Hubbard, Community Resource Partner	x		
Rosie Lasca, FA	x		
Tom Hopkins, SA		x	
Nelia Nunes, FA		x	
David Kline, SA	x		
Samantha Moore, FA	x		

Legend:

SA – Self-Advocate
FA – Family Advocate
SP – Service Provider

Non-members Present:

Mechelle Johnson, ACRC	Rachel Palmer Teefy, PEC	Yadir Morales
Tracy Brown, ACRC	David Ellis, Cambrian	Mirela Bere
Faye McKenzie, ACRC	Shannon Mendez	Hana Ko
Anne Shayler, ACRC	Pam Haney Slinkard	Beth Martinko
Kenisha Hurd, ACRC	Bianca Magallon-Flores, PPL FMS	Donna Tweltridge
Anne Shayler, ACRC	Elena Betts B., parent	Wren Rother, IF, Engaged Services
Loril Tochterman, ACRC	Natalie Cooper	Veronica Turdean
Kizi Smith, ACRC	Jaclyn Balanay, DDS	Emily Scholl
Cat Carl, ACRC	Paul Andrus, Parent, IF	Nels Toriano, New Heights Valley
Ashley Henderson, ACRC	Lisa Hooks, SCDD	
Alphonso Ramirez, ACRC		
Patricia, ACRC		

1. ***Welcome and Purpose – Alta/SCDD***
   Jennifer Bloom, ACRC, provided an overview of the Self-Determination Advisory Committee (SDAC) structure, including the roles of the regional center and the State Council on Developmental Disabilities (SCDD). Meeting schedule and language-access procedures, and the multiple ways the public can access information, provide input, and request follow-up outside of SDAC meetings were also provided.

2. ***Call to Order by Lisa Cooley, Chair***
   Welcome & Introductions (1:00 p.m.)

3. ***Approval of Agenda & Minutes – Lisa Cooley, Chair***
   Chair Lisa Cooley called the meeting to order at 1:09 p.m. and requested a motion to approve the agenda and minutes from the previous meeting.

   As requested by the committee, Kizi will email the agenda and meeting minutes to all committee members in advance to ensure informed voting.

M/S/C (Tanishia/Kelsey) **Made the motion to approve the agenda for today's meeting and the July 8th meeting minutes.**

The committee approved today's agenda and the July 8th SDAC meeting minutes.

4. ***Public Comment Period***
   - Paul shared a concern regarding low pay rates for personal assistants caused by budget limitations and FMS costs. He asked for clearer, consistent guidance on how hours are determined and how families can request a formal decision when a service is denied.
   - Rachael PEC, noted significant delays in the budget process, noting that some services take over a month to reach committee approval , and issues with receiving timely payments from Financial Management Services (FMS). Noted a overdue invoice that she will follow up on with Kenisha.
   - Wren suggested updating ACRC's online SDP materials so timelines and instructions reflect current practice. They also encouraged more consistent guidance across service coordinators and offices, timely

budget processing, and consideration of a more streamlined structure for SDP support.

- Veronica asked ACRC to clarify how spending plans are reviewed, particularly whether they must match the traditional service lines used to calculate an individual budget. She referenced the Lanterman Act and a DDS directive and requested timely, clear guidance so her son's upcoming plan could proceed.
- Eleni raised a similar concern about spending plans being required to match the exact traditional service lines used in the individual budget and asked that certification practices be reviewed for consistency with SDP requirements.

5. ACRC SDP Updates

A. **General SDP Update**

- Kenisha shared that as of September 1, 2026, ACRC has 703 individuals who have fully transitioned to SDP. Of those, 417 are White, and 286 are Non-White. The Ethnicity breakdown is Asian (82), Black (47), Latin (44), Mixed (38), and Other (75). Sacramento has the highest enrollment (338), followed by Placer County (133), then Nevada County (97), El Dorado (70), and Yolo County (47).
- ACRC has 25 vendored Financial Management Service (FMS) Agencies(also available on DDS's website):
- AAA FMS, Accura FMS, ACE FMS, Action FMS, Aid FMS, Arch FMS, Balance FMS, Cambrian, Dromen, Inc., Essential Pay, Fact Financial Management Services, Stro Financial Services, FMS Pay, GRD Fiduciary Services, GT Independence, Home of Guiding Hands, HR Alliance West, Mains'l, Premier DBA Aveanna Healthcare, Public Partnerships, Ridgeline FMS, Ritz FMS, Inc., Sentinel Four, Sequoia, Tracy Stein Management Services, Inc.
- 48 Providers are vendored for Self-Directed Services (up to 40 hours of pre-enrollment training and supports).
    1. AAA Pathways
    2. Ace FMS
    3. Adjoin
    4. Alexa Guerrero
    5. AMFC Empower People DBA New Horizon Resources
    6. Aminah Abdul Hakim
    7. R&D Assessment and Consulting Services
    8. Choicess (yes, two "s" in the spelling)
    9. Community Integration Specialists

10. Danielle Alvarado
11. Dignified Independent Facilitator, LLC.
12. Dromen, Inc.
13. Engaged Services
14. Expand Yu, LLC
15. FMS Pay, LLC
16. Girasol Hive, LLC
17. Hand full of Stories
18. Hero Facilitation, LLC
19. HR Alliance West, Inc.
20. I Can Choose, LLC
21. James Cerebral Palsy Foundation
22. Kaimen LLC DBA Oliveyou
23. Kimberlie Rollins
24. La Vi La CIP
25. Life Leap Services
26. Lighted Path Solutions, LLC
27. Linking Pathways
28. Lori Ross
29. Mirela Bere
30. MKRD Consulting
31. Monica Star Vandevender
32. My SDP Plan
33. Neimah Care
34. Neurodiversity PBC
35. Permatransitions, LLC
36. Phoenix Facilitation of California, LLC
37. Premier Healthcare SVS DBA Aveanna Healthcare
38. Prescott Consulting Services, LLC
39. Quality Life Services
40. Helen Reese
41. REP Harmony Support Services, Inc.
42. Rollins Independent Facilitation Consultation
43. Zero Surico
44. Swathi Allamesetti
45. The Gifts Foundation
46. Thriving Futures
47. Upcountry Advocate, LLC
48. Ying Tang

- 8 providers for PDS Self-Directed Services (up to 40 hours of pre-enrollment training and supports paid via FMS):
  1. Ace FMS
  2. Action FMS
  3. Community Engaged Payee Support (CEPS)
  4. GRD Fiduciary Services
  5. Premier Healthcare Services DBA Aveanna Healthcare
  6. Public Partnerships, LLC
  7. Ranjit Labiano
  8. Ridgeline FMS

- The California State Council on Developmental Disabilities (SCDD), in partnership with the California Department of Developmental Services (DDS), offers statewide SDP Orientations for people interested in the Self-Determination Program (SDP).
  - Beginning April 1, 2026, the SDP Orientation will be offered in two parts. Each part is two hours. You must complete both parts before beginning the SDP transition. If you completed the orientation before April 1, 2026, or are already enrolled, you do not need to retake it.
    - Available in the following 10 languages:
      - English
      - Arabic
      - Armenian
      - ASL
      - Chinese
      - Farsi
      - Hmong
      - Korean
      - Tagalog
      - Vietnamese
  - Certificates are provided to participants who attend the full session and submit the required information. **Required information includes the first and last name of the person served by the regional center and their Unique Client Identifier (UCI).**
  - Once all information is confirmed, certificates are typically sent within two weeks. Information about certificate recipients is shared with the Department to support enrollment.
- There are 10 PCS's currently supporting all case management units. PCS support role/duties were highlighted at the beginning of this meeting.

- Due to an increase in DDS Directives, SDP enrollments, changes in case management staff, and overall agency growth. Current internal and external processes are under review to identify and implement more support from PCS's to case management teams.
    - Required Once monthly trainings for managers and Lead Service Coordinators
    - PCS support in internal and external meetings
    - Case Management Presentations on SDP Process
    - Critical timeline reminders beginning at the 4-month mark prior to renewal
    - Monthly collaboration with local Independent Facilitator Round Table facilitated by Rosie Lasca
- In Partnership with SDAC's partnership with Cambrian FMS to offer SDP workshops to long standing and newly enrolled participants, ACRC has advertised Cambrian's flyer for SDP workshops on all of its social media platforms. The next workshops will be held September 8th and 22nd at 11am. Please call Cambrian FMS to register 916-655-4932.
- The year 2+ SDP renewal checklist is completed and ready to be shared with participants (attached).

Ongoing meetings and collaboration

- Collaboration between Regional Centers continues with monthly meetings.
- Monthly Statewide SDP meetings continue.
- PCSs continue to attend unit meetings to share information, resources, and technical support (clarification on directives and service definitions related to service requests in spending plans).
- Weekly office hours for our Grass Valley office, as they are comprised of 20% of overall SDP participants.
- Standing meetings with CSMs for units with higher enrollment numbers.
- Spending plan committee convenes every Tuesday and Thursday afternoon and includes PCS's, Service Coordinators, Client Services Managers, SDP Manager, and Associate Director(s)
- Staffings may take 15-30 minutes, and feedback is provided to the SC in real time. A summary of the discussion and action items (if applicable) are shared with the SC via email.
- Spending plan committee for budgets with the following services:
    - Health and safety support funding i.e. 24/7 care and supervision
    - Clinical Services i.e. behavior support services

- Exceptions i.e. service hours beyond statutory limits

Outreach

Event Name	Date	Populations Served	County	Event Type
Sacramento Pow Wow at O'Neal Park	8/7/26	All; Tribal Communities	Sacramento	Info Table
Wave Foundation	8/11/26	All	Sacramento	Info Table
Greater Sacramento Alcove Community Meeting	8/17/26	All	Sacramento	Info Table
Sacramento Tribal TANF Community Partner Meeting	8/26/26	All; Tribal Communities	Sacramento	Info Table

- Outreach activities coordinated by ACRC's Diversity Outreach Workgroup posts its outreach events on social media platforms.
- SCs continue to discuss SDP with clients and families during quarterly meetings, planning team meetings, annual IPP meetings, and when prompted. This includes support with registering for the required orientation.
- We are interested in your ideas and suggestions on where outreach may be helpful.

SDP Directives

- No new Directives since March 2026.

Previous Public Comments

Please include your contact information so that you may receive a timely call back.

- Q. What is the reason for being terminated from SDP?
  - W&I Code 4685.8(g) If at any time during participation in the Self-Determination Program a regional center determines that a participant is no longer eligible to continue in, or a participant voluntarily chooses to exit, the Self-Determination Program, the regional center shall provide for the participant's transition from the Self-Determination Program to other services and supports. This transition shall include the development of a new IPP that reflects the services and supports necessary to meet the individual's needs. The regional center shall ensure that there is no gap in services and supports during the transition period.

        - In the event an individual is determined ineligible for SDP, the participant will be issued a Notice of Action detailing the reason for the determination with appeals rights and procedural steps.
- Q. What is PCS Level 1 & 2
    - PCS Levels are based on education and years of service, like that of Service Coordinator levels. The higher level denotes higher education and more years of service.
- Q. What does it mean that Nov 2025 Directive is not required for previously approved spending plans?
    - IF a spending plan was approved and implemented prior to the Nov 2025 directive, then the requirements set forth in the Nov 2025 directive will not be taken into consideration if said plan is revised/amended during the plan year. As such, the participant will not be asked to bring the entire plan into compliance with the directive.

Public Comment

- Rosie requested participation data by language to be added to the report, more diverse outreach, and clarification about SC training.
- Jennifer noted that she would share Rosie's outreach feedback with the Diversity Outreach Workgroup.
- Anne confirmed the SCs receive onboarding, follow-up and monthly training.

6. ***SDAC Funds Update***
   - Jennifer noted that $3,257.07 remains in implementation funds that must be spent by February 2027.
   - Rosie suggested using these funds for educational materials or plain language booklets to increase accessibility for families.
   - The committee discussed utilizing the remaining $3,257.07 in SDAC implementation funds before February to improve translated materials and plain-language resources.
   - The committee proposed using remaining funds to translate materials into more languages to better serve diverse communities like the Russian-speaking population mentioned by Tanishia.
   - Rosie asked whether other funding could support ongoing SDP outreach after implementation funds end.
   - Jennifer noted that Language Access and Cultural Competency funds could be explored.
7. ***Supporting Transition to SDP***
   - David Ellis, Cambrian FMS, shared recent training sessions held in August that served both ACRC staff and program participants and proposed holding in-person training sessions. The group disused locations such as Auburn, Roseville, or Yolo to reach rural participants more effectively.
   - Anne suggested Roseville as a central location.
   - The group landed on Auburn and Yolo County and will confirm dates.
   - Rosie encouraged targeted, language-specific outreach to better understand and address low participation from diverse communities.
8. ***Workflow Group Discussion***
   - The committee addressed unresolved issues regarding workflow consistency by forming a new voluntary work group with volunteers including Benita, Samantha, Tanishia, Rosie, and Margaux to address how budgets and services are processed.
   - Lisa H., SCDD, will coordinate the workflow workgroup and send a scheduling poll to volunteers, including Jennifer and Carmen.
   - Kizi will add the workflow workgroup update as a standing agenda item for future meetings.
9. ***Action Items from Prior SDAC Meeting***
   - **Discuss workflow group.**

  - Discussed.
- **Process flow with timelines and expectations, including alternate options.**
  - Discussed.

10. SDAC Member Comment Period

- Samantha shared a case involving a pending request to move funds in a spending plan. She highlighted the importance of timely decisions for participants and their support workers and volunteered to help the workflow group develop practical improvements.
- Lisa H. encouraged members to work collaboratively, clarify where process delays arise, and make documentation requirements easier to understand and apply consistently.
- Jennifer Bloom invited members to share concerns with her and Kenisha Hurd as they arise, so ACRC can better understand situations and explore ways to support families.
- Benita thanked participants for sharing their experiences and emphasized the value of accessible communication, language support, and processes that help families and self-advocates feel heard and supported.
- Lisa H. suggested an overview of the SDP budget process.
- Samantha suggested sharing a template or guidance for spending-plan revisions.
- Benita requested more information about the Spending Plan Committee document requirements.

11. Dates for Upcoming 2026 meetings:

- Wednesday, November 18th, 2026, 6:00-8:00 pm **Remote Only**

12. Identify agenda items for the next meeting

- ACRC Overview of the SDP budget process
- Template or guidance for spending plan revisions
- SDP Spending Plan Committee Document Requirements
- Please submit agenda items to Kizi Smith, ACRC.

13. The meeting adjourned at 3:10 p.m.