

**Regional Center of Orange County  
Self-Determination Program Local Advisory Committee Meeting  
Date: September 30, 2024  
6:30 p.m. - 8:30 p.m.  
Zoom Meeting**

**Register in advance for this meeting:**

<https://rcocdd.zoom.us/meeting/register/tJMqcu6qpzkiGtSFG0R5OPvflDeYIXleqqUx>

*“Self-determination provides consumers and their families with an individual budget which they can use to purchase the services and supports they need to implement their Individual Program Plan.”*

***Please note: in accordance with the Bagley Keene Act, Section 11125.7: Members of the public may directly address this Committee on each agenda item before or during the Committee’s discussion and consideration of each agenda item. We would be grateful if comments could be limited to three minutes.***

**AGENDA**

- |    |   |      |
|----|---|------|
| 1. | Welcome and Introductions   | All  |
| 2. | Approval of July 29, 2024 Meeting Summary   | All  |
| 3. | Funding to Support Implementation of the Self-Determination Program for Fiscal Year 2022-2023   | All  |
|    | a. Review submitted RFP for PCP Training to develop More Independent Facilitators (IF) - IF training<br><a href="https://www.rcocdd.com/wp-content/uploads/pdf/rfp/04.29.2024PCPTrainingforIF.pdf">https://www.rcocdd.com/wp-content/uploads/pdf/rfp/04.29.2024PCPTrainingforIF.pdf</a>   |      |
|    | b. Review submitted RFP submissions for SDP Resource Fair Follow-Up<br><a href="https://www.rcocdd.com/wp-content/uploads/pdf/rfp/RFP-FollowuptoResourceFair.pdf">https://www.rcocdd.com/wp-content/uploads/pdf/rfp/RFP-FollowuptoResourceFair.pdf</a>  |      |
|    | c. Review of Alternative Options for Funding to Support Implementation of the Self-Determination Program – Coaching for Individuals   |      |
| 4. | Review DDS Directive regarding non-employer burden<br><a href="https://www.dds.ca.gov/wp-content/uploads/2024/05/Self-Determination-Program-Employer-Burden-and-Other-Employment-Related-Costs.pdf">https://www.dds.ca.gov/wp-content/uploads/2024/05/Self-Determination-Program-Employer-Burden-and-Other-Employment-Related-Costs.pdf</a> | All  |
| 5. | RCOC Self-Determination Activities:   | RCOC |
|    | a. Current listing of all the Regional Center’s Self-Determination Participation Status   |      |
| 6. | Community Input and Barriers to Completing the SDP Process  | All  |
| 7. | Agenda Items and Date of the Next Meeting   | All  |
| 8. | Adjourn   | All  |

## **Request for Proposal**

**From Self-Determination Local Advisory Committee for RCOC**

**Issued on November 6, 2023**

**Deadline for submission: September 15, 2024**

**Background:** Self-Determination Program Local Advisory Committees (SDP LAC's) were established by law to provide oversight of the Self-Determination Program (SDP) and make recommendations for improvement to each local regional center and the Department of Developmental Services. Periodically, funds are granted by the Department of Developmental Services (DDS) to the SDP LAC's and Regional Centers to support the implementation of the SDP. The SDP LAC for Regional Center of Orange County (RCOC) has prioritized the needs in the local area for the use of the first provision of funds, and is seeking proposals from interested parties to carry out the below project which the committee wishes to fund.

### **Project Proposal/Description: Person-centered Planning (PCP) Training for Prospective and New Independent Facilitators**

Person-centered Planning (PCP) gives the participant's agency to choose how they want to live their life, including what their goals are and what they need. The National Association of State Directors of Developmental Disabilities (NASDDDS) defined PCP as ... "a way to assist people who need support in their life to construct and describe how they envision their life, their goals, what they need, and how they prefer their needs be met, in order to include purpose and meaning in their life."

Proposals are being accepted that teach prospective and new Independent Facilitators (IF) how to conduct a successful PCP meeting and create an effective PCP plan for SDP participants of the RCOC. This training should take into consideration any and all DDS changes to SDP. The training may be conducted remotely via Zoom or in-person with the option for attendees to participate by Zoom. The training must be available in English, Spanish, and Vietnamese.

**Total funding available: TBD (approved by LAC on 4/29/2024)**

**Project must be completed by February 28, 2025.**

### **Application Instructions**

Submit the following documentation/information by September 15, 2024:

1. Application Questionnaire
2. Responses to the project-specific questions
3. Project budget

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**GENERAL APPLICATION QUESTIONNAIRE**

1. Name of Applicant (Organization or Individual)
2. Is Applicant an Independent Contractor / Sole Proprietor, Partnership, LLC, or a corporation (indicate whether nonprofit or for profit)
3. Name of Primary Contact
4. Email of Primary Contact
5. Telephone Number of Primary Contact
6. Address
7. Website (if applicable)
8. What percentage of the ownership of this business or of the total number of members of the Board of Directors are persons with developmental disabilities or cross-disabilities? What is the demographics of the Board of Directors and/or vested owners?
9. Describe your experience:
  - a. Working with persons with intellectual or developmental disabilities including the scope of the services you have provided
  - b. Working with underserved, unserved, or BIPOC communities
  - c. With community outreach, training, and resource development
10. Describe your familiarity and experience with:
  - a. Use of plain language / universal design of learning (including drafting plain language materials and speaking in plain language)
  - b. Community resources, the regional center system, and other agencies who have a role in supporting people with intellectual and/or developmental disabilities
11. List the project you are applying for under this RFP
12. Provide us with the name and contact information (telephone, email address) of 3 professional references

## **PROJECT SPECIFIC-QUESTIONNAIRE**

In addition to responding to the general application, please answer the supplemental questions below on a separate paper:

1. Your experience in SDP, including the name of the associated regional center(s) where you provide services.
2. Your experience with Person-centered planning.
3. List the relevant qualifications for the individuals who would be responsible for carrying out this project.
4. Ability to maintain and monitor project plans, project schedules, work hours, budgets, and expenditures.
5. Outline the timeline for completion of tasks to ensure project deadline is met by February 28, 2025.
6. Identify the anticipated outcomes of your project and how will you measure your success.
7. Attach a one-page Project Budget showing how funds will be utilized. Please include separate line items for all planned expenditures.

## **Solicitud de Propuesta**

**del Comité Asesor Local de Autodeterminación para el RCOC**

**Emitida el 6 de noviembre de 2023**

**Fecha límite para la entrega: 15 de septiembre de 2024**

**Antecedentes** Se establecieron los Comités Asesores Local del Programa de Autodeterminación (los SDP LAC) por ley para supervisar el Programa de Autodeterminación (SDP) y hacer recomendaciones para mejorar cada uno de los centros regionales locales y del Departamento de Servicios del Desarrollo. El Departamento de Servicios del Desarrollo (DDS) otorga fondos periódicamente a los SDP LAC y los centros regionales para apoyar la implementación del SDP. El SDP LAC para el Centro Regional del Condado de Orange (RCOC) ha dado prioridad a las necesidades en el área local para el uso de la primera disposición de fondos y está solicitando propuestas de partes interesadas en realizar el proyecto que se describe enseguida y que el comité desea financiar.

### **Propuesta de proyecto/Descripción Capacitación de planificación centrada en la persona (PCP) para facilitadores independientes potenciales y nuevos**

La planificación centrada en la persona (PCP) ofrece a la agencia del participante la opción de escoger cómo desea vivir su vida, incluidas cuáles son sus metas y lo que necesitan. La Asociación Nacional de Directores Estatales de Discapacidades del Desarrollo (NASDDS) define a la PCP como “...una manera de ayudar a las personas que necesitan ayuda en su vida para construir y describir cómo se imaginan su vida, sus metas, lo que necesitan y cómo prefieren que se cubran sus necesidades para poder incluir un propósito y significado en su vida”.

Se aceptan propuestas que enseñen a los facilitadores independientes potenciales y nuevos cómo dirigir con éxito una reunión de PCP y de crear un plan de PCP efectivo para los participantes del SDP del RCOC. Esta capacitación debe tomar en consideración todos y cada uno de los cambios del DDS al SDP. Se podrá realizar la capacitación remotamente por Zoom o en persona, con la opción de que los asistentes participen por Zoom. La capacitación debe ofrecerse en inglés, español y vietnamita.

**Financiamiento total disponible: Por determinar (aprobado por LAC el 29 de abril de 2024)**

**Se debe completar el proyecto para el 28 de febrero de 2025.**

### **Instrucciones para la solicitud**

Entregar la siguiente documentación/información para el 15 de septiembre de 2024:

1. Cuestionario de la solicitud
2. Respuestas a preguntas específicas del proyecto
3. Presupuesto del proyecto

## **CUESTIONARIO GENERAL DE LA SOLICITUD**

1. Nombre del solicitante (organización o individual)
2. Si el solicitante es un contratista independiente/propietario único, una asociación, una sociedad de responsabilidad limitada o una sociedad anónima (indicar si es con o sin fines de lucro)
3. Nombre del contacto principal
4. Correo electrónico del contacto principal
5. Número de teléfono del contacto principal
6. Dirección
7. Sitio web (si procede)
8. ¿Cuál es el porcentaje de la propiedad de esta empresa o del número total de miembros de la Junta Directiva que son personas con discapacidades del desarrollo o con discapacidades cruzadas? ¿Cuáles son las estadísticas demográficas de la Junta Directiva y/o los propietarios con interés personal?
9. Describa su experiencia:
  - a. Trabajar con personas con discapacidades intelectuales o del desarrollo, incluido el alcance de los servicios que usted ha prestado.
  - b. Trabajar con comunidades marginadas, ignoradas o de afrodescendientes, indígenas y personas de color (BIPOC).
  - c. Participación con la comunidad, capacitación o desarrollo de recursos.
10. Describa su familiaridad y experiencia con:
  - a. El uso de lenguaje sencillo/diseño universal de aprendizaje (incluidos preparación de materiales en lenguaje sencillo y hablar en lenguaje sencillo)
  - b. Recursos comunitarios, el sistema de centros regionales y otras agencias que desempeñan un papel en apoyar a las personas con discapacidades intelectuales y/o del desarrollo.
11. Enumere el proyecto para el que está presentando una solicitud conforme a esta RFP.
12. Denos el nombre y la información de contacto (teléfono, dirección electrónica) de tres referencias profesionales.

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### **CUESTIONARIO ESPECÍFICO DEL PROYECTO**

Además de responder a la solicitud general, responda a las preguntas complementarias a continuación en una hoja aparte:

1. Su experiencia en el SDP, incluido el nombre del centro o centros regionales asociados en donde usted presta servicios.
2. Su experiencia en planificación centrada en la persona.
3. Una lista de cualificaciones relevantes para las personas que serían responsables de llevar a cabo este proyecto.
4. Su habilidad para mantener y supervisar planes de proyectos, horarios de proyectos, horarios, presupuestos y gastos.
5. Una descripción de una línea de tiempo para completar las tareas y asegurar que se cumpla con la fecha límite del proyecto para el 28 de febrero de 2025.
6. La identificación de resultados previstos de su proyecto y cómo medirá usted su éxito.
7. Adjunte un “Presupuesto del proyecto” de una página que muestre cómo se utilizarán los fondos. Incluya conceptos separados para todos los gastos planeados.

## Đề Nghị Mời Thầu

**Từ Ủy Ban Cố Vấn Địa Phương Cho Chương Trình Tự Quyết Định của RCOG**  
**Ban hành ngày 6 tháng 11 năm 2023**  
**Hạn cuối nộp đơn: Ngày 15 tháng 9 năm 2024**

**Bối Cảnh:** Ủy Ban Cố Vấn Địa Phương Cho Chương Trình Tự Quyết Định (Self-Determination Program Local Advisory Committees, SDP LAC) được thành lập theo luật để giám sát Chương Trình Tự Quyết Định (Self-Determination Program, SDP) và đưa ra các khuyến nghị để cải thiện cho từng Trung Tâm Khu Vực địa phương và cho Sở Dịch Vụ Phát Triển. Theo định kỳ, Sở Dịch Vụ Phát Triển (Department of Developmental Services, DDS) sẽ cấp kinh phí cho SDP LAC và các Trung Tâm Khu Vực để hỗ trợ việc triển khai SDP. SDP LAC cho Trung Tâm Khu Vực Quận Cam (Regional Center of Orange County, RCOG) đã ưu tiên các nhu cầu trong khu vực địa phương để sử dụng khoản kinh phí đầu tiên, và đang tìm kiếm các đề xuất từ những bên quan tâm để thực hiện dự án mà ủy ban muốn tài trợ dưới đây.

**Đề Xuất/Mô Tả Dự Án:** **Chương Trình Đào Tạo Lập Kế Hoạch Tập Trung vào Con Người (Person-Centered Planning, PCP) cho Những Người Hướng Dẫn Độc Lập Tiềm Năng và Mới**

Lập Kế Hoạch Tập Trung vào Con Người (PCP) cho người tham gia cơ hội chọn lựa cách sống mà họ mong muốn, bao gồm cả xác định mục tiêu và những gì cần thiết để đạt được điều họ muốn. Hội Đồng Quản Trị Tiểu Bang Về Khuyết Tật Phát Triển (National Association of State Directors of Developmental Disabilities, NASDD) định nghĩa PCP là... “một cách để hỗ trợ những người cần được hỗ trợ trong cuộc sống hàng ngày để xây dựng và mô tả cách họ hình dung về cuộc sống, mục tiêu, nhu cầu và cách họ muốn nhu cầu của mình được đáp ứng, nhằm giúp họ tìm thấy mục đích và ý nghĩa cuộc sống”.

Các đề xuất đang được chấp nhận để hướng dẫn những Người Hướng Dẫn Độc Lập (IF) tiềm năng và mới cách tiến hành cuộc họp PCP thành công, và lập kế hoạch PCP hiệu quả cho những người tham gia SDP của RCOG. Chương trình đào tạo này cần xem xét mọi và tất cả các thay đổi của DDS đối với SDP. Chương trình đào tạo này có thể được tiến hành từ xa, thông qua Zoom hoặc tiến hành trực tiếp với lựa chọn tham gia qua Zoom. Chương trình đào tạo phải có sẵn bằng tiếng Anh, tiếng Tây Ban Nha và tiếng Việt.

**Tổng kinh phí có sẵn: Sẽ được quyết định sau (đã được LAC phê duyệt vào ngày 29/4/2024)**

**Chương trình cần hoàn thành chậm nhất vào ngày 28 tháng 2 năm 2025.**

### **Hướng Dẫn Đăng Ký:**

Nộp các giấy tờ/thông tin sau chậm nhất là vào ngày 15 tháng 9 năm 2004:

1. Bảng Câu Hỏi Đăng Ký
2. Trả lời các câu hỏi cụ thể của dự án.
3. Kinh phí của dự án



## **BẢNG CÂU HỎI ĐĂNG KÝ CHUNG**

1. Tên Người Nộp Đơn (Tổ Chức hoặc Cá Nhân)
2. Người nộp đơn có phải là Nhà Thầu Độc Lập/Chủ Sở Hữu Duy Nhất, Đối Tác, LLC hay một công ty (ghi rõ là phi lợi nhuận hay có lợi nhuận)
3. Tên Người Liên Hệ Chính
4. Email của Người Liên Hệ Chính
5. Số Điện Thoại của Người Liên Hệ Chính
6. Địa Chỉ
7. Trang Web (nếu có)
8. Tỷ lệ phần trăm sở hữu doanh nghiệp này, hoặc tổng số thành viên của Hội Đồng Quản Trị là người khuyết tật phát triển hay bất cứ dạng khuyết tật nào? Cơ cấu nhân khẩu học của Hội Đồng Quản Trị và/hoặc chủ sở hữu cổ phần như thế nào?
9. Mô tả kinh nghiệm của quý vị liên quan tới:
  - a. Làm việc với những người khuyết tật về trí tuệ hoặc phát triển, bao gồm phạm vi các dịch vụ mà quý vị đã cung cấp
  - b. Làm việc với các cộng đồng thiếu thốn dịch vụ y tế, không được tiếp cận dịch vụ y tế hoặc cộng đồng BIPOC (người da đen, da màu và thổ dân bản địa)
  - c. Với các hoạt động tiếp cận cộng đồng, đào tạo và phát triển nguồn lực
10. Mô tả mức độ quen thuộc và kinh nghiệm của quý vị với:
  - a. Việc sử dụng ngôn ngữ đơn giản / thiết kế chương trình học tập phổ quát (bao gồm soạn thảo tài liệu bằng ngôn ngữ đơn giản và nói chuyện bằng ngôn ngữ đơn giản)
  - b. Các nguồn lực cộng đồng, hệ thống Trung Tâm Khu Vực và các cơ quan khác có vai trò hỗ trợ những người khuyết tật về trí tuệ và/hoặc phát triển
11. Liệt kê dự án quý vị đang nộp đơn bằng Đề Nghị Mời Thầu (RFP) này
12. Cung cấp cho chúng tôi tên và thông tin liên lạc (điện thoại, địa chỉ email) của 3 người giới thiệu có chuyên môn của quý vị

## **BẢNG CÂU HỎI CỤ THỂ VỀ DỰ ÁN**

Ngoài việc trả lời đơn đăng ký chung, vui lòng trả lời các câu hỏi bổ sung bên dưới trên một tờ giấy riêng:

1. Kinh nghiệm của quý vị trong lĩnh vực SDP, bao gồm tên của (các) trung tâm khu vực liên quan nơi quý vị cung cấp dịch vụ.
2. Kinh nghiệm của quý vị trong lĩnh vực lập Kế Hoạch Tập Trung vào Con Người.
3. Liệt kê các bằng cấp liên quan của những cá nhân chịu trách nhiệm thực hiện dự án này.
4. Khả năng duy trì và giám sát kế hoạch dự án, lịch trình dự án, giờ làm việc, ngân sách và các khoản chi tiêu.
5. Vạch ra mốc thời gian hoàn thành các nhiệm vụ để đảm bảo dự án đáp ứng được thời hạn hoàn thành vào ngày 28 tháng 2 năm 2025.
6. Xác định kết quả mong đợi của dự án và cách quý vị đo lường mức độ thành công của mình.
7. Đính kèm bản Ngân Sách Dự Án dài một trang nêu rõ cách sử dụng khoản quỹ. Vui lòng ghi ra từng mục riêng biệt cho tất cả các khoản chi đã lên kế hoạch.

Self-Determination Local Advisory Committee  
Regional Center of Orange County (RCOC)

Proposal

Person-Centered Planning (PCP) Training for  
Prospective and New Independent Facilitators

September 15, 2024



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NOTE: "CORE" refers to delivery in the language, i.e. no interpreter, language is acquired directly from instructor speaking language to trainee understanding that language, not through a 3<sup>rd</sup> party.

## GENERAL APPLICATION QUESTIONNAIRE

1. **Applicant:**  
Autism Society of America - Los Angeles, Inc
2. **Business Structure:**  
Corporation - Nonprofit
3. **Contact Person:**  
Kim Sinclair - Executive Director
4. **Email:**  
[Kim@autismla.org](mailto:Kim@autismla.org)
5. **Telephone:**  
[REDACTED]
6. **Address:**  
[REDACTED]  
Torrance, CA 90503
7. **Website:**  
<https://www.autismla.org>
8. **Diversity of ASLA Board of Directors:**

27% are Self-Advocates  
36.5% are family members (parent or sibling)  
36.5% are professionals in the Developmental Disability world

In addition, the board represents the diversity of race, color, religion, sex (including pregnancy, gender identity, and sexual orientation), national origin, age (40 or older), and disability.

Learn about the ASLA Board at:  
<https://www.autismla.org/1/staff-category/board-of-directors/>

#### 9. ASLA Experience:

- a. Working with persons with intellectual or developmental disabilities including the scope of services you have provided.
- b. Working with underserved, unserved, and BIPOC communities
- c. With community outreach, training, and resource development

ASLA has a combined total of well over 100 years of experience with people with developmental disabilities throughout the lifespan, both lived and career-based as parents of individuals with disabilities, self-advocates, siblings and professionals. We represent underserved, minority and BiPOC communities. The team assembled for this project has the ability and desire to meet the needs of the diverse community of RCOC, with subject matter experts, parent advocates and self-advocates that aim to provide culturally and linguistically appropriate training via Zoom to further the overall reach of SDP and Person-Centered Regional Center services at RCOC.

56% of the ASLA team is bilingual with Spanish and English or Korean and English. Also, 22% represent Asian ethnicities.

In addition to projects listed in **ASLA SDP Skills and Experience** section which demonstrate a strong focus on outreach across all of the community, ASLA's mission is:

*Autism Society of Los Angeles will empower individuals with Autism and other Disabilities, their families, and professionals through advocacy, education and community support to ensure an equitable quality of life for all.*

ASLA's core competency is education, whether 1:1 through the resource warm-line or training community members like LAPD on a bi-weekly basis. ASLA is a leader in the disability community, training self-advocates, parents, caregivers and professionals.

**10. Familiarity and Experience with:**

- **Use of plain language/ universal design practices**

ASLA has been providing plain language content and universally designed practices in their delivery and deliverables to help break down barriers and improve access for all. This has been done informally as part of core/“lights on” services, and formally through Equity and Access projects, since 2017.

- **Community resources, Regional Center system, and other agencies who have a role in supporting people with intellectual and/or developmental disabilities**

67% of the ASLA team have a family member who receives Regional Center services, so they are familiar with navigating community resources and systems. In addition, ASLA provides a free Resource Warm Line to help the community identify systems of support, and to assist community members to obtain services for people with intellectual and/or developmental disabilities.


**11. Project Application**

Person-Centered Planning (PCP) Training for Prospective and New Independent Facilitators.

**GOAL : *Participants will be equipped with the tools to create, develop and present comprehensive PCPs.***

**12. Professional References**

Reference	Telephone & email
<p>██████████ PhD            Research Scientist, Director, Community Education, USC University Center for Excellence in Developmental Disabilities at Children’s Hospital Los Angeles            Assistant Professor of Clinical Pediatrics   Keck School of Medicine of USC</p>	<p>██████████            ██████████</p>
<p>██████████            Hope of Spectrum Foundation Co-Founder, attorney at law, board of LA Families for Effective Autism Treatment</p>	<p>██████████            ██████████</p>
<p>██████████ LCSW            Developmental Case Manager, Kaiser Permanente</p>	<p>██████████            ██████████</p>
<p>██████████</p>	<p>██████████</p>

Aveanna Healthcare Division President	
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## PROJECT SPECIFIC QUESTIONS

### 1. ASLA SDP Skills and Experience

- ASLA was a co-sponsor of the Self-Determination Law and has been providing instruction since 2015.
- 44% of the ASLA team have one or two family members in SDP.
- ASLA has presented several SDP conferences since 2015, with hundreds of self-advocates, caregivers, parents and professionals attending across California.

ASLA has the expertise, both lived and technical, to balance existing Independent Facilitator (IF) Training project commitments across California. ASLA has a proven track record implementing SDP IF projects, including:

<b>Year awarded</b>	<b>Project title</b>	<b>Grant/contract number</b>	<b>Languages supported</b>
2024	Inland Regional Center (IRC)	IF recruitment, training & testing	English, Spanish
2024	Harbor Regional Center (HRC)	IF Training	English, Spanish
2024	South Central Los Angeles Regional Center (SCLARC)	IF Training	English, Spanish
2023	DDS SAE - Cross-Cultural Independent Facilitator Advanced Training Program	22-c27	English, Spanish, Korean
2022	DDS - Cross-Cultural Independent Facilitator Mentor Training Program for the Self-Determination Program	21-c27	English, Spanish, Korean
2022	Eastern Los Angeles Regional Center (ELARC)	ASLA/0352 2021/2022	English, Spanish, Cantonese
2022-2023	North Los Angeles County Regional Center (NLACRC)	IF Training & Support Group Facilitation	English, Spanish
2021	DDS SAE - Cross-Cultural Independent Facilitator Mentor Training Program for the Self-Determination Program	20-c27	English, Spanish, Korean



2019-2020	DDS SAE - Cross-Cultural Independent Facilitator Trainings and Ongoing Support for the Self-Determination Program	18-c27	English, Spanish
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## 2. Team Qualifications with Person-Centered Planning

- **Carola Maranon**

**Project Lead, ASLA; Founder, Resilience Facilitation Services LLC**

- Successful transition of multiple individuals speaking both English and Spanish into SDP
- Vendored for SC099 and SC024 across 6 Regional Centers; Provides IF services through Resilience Facilitation Services
- 2 sons in 3rd year of SDP; Carola integral to updating yearly plans

- **Naomi Hagel**

**Founder, Phoenix Facilitation**

- Credentialed Person-Centered Thinking Trainer by The Learning Community for Person-Centered Practices
- Successfully onboarded approximately 48 individuals into SDP at SCLARC
- Vendor Director, Program Manager at SCLARC
- Awarded/managed many LVAC contracts
- Extensive PCP, IF and advocacy services through Phoenix Facilitation, spread across 17 Regional Centers statewide
- Supported multiple IFs with PCPs and other tasks related to the complex IF role
- PCT Trainer for ASLA’s Advanced IF Training 2023

- **Bertha Taylor**

**Founder, ABA 360**

- Completed a 4-month program on Person-Centered Planning with Helen Sanderson Associates

- Bilingual Certified Trainer for Person-Centered Thinking by The Learning Community for Person-Centered Practices since 2022
- Member of SDRC LAC and strong supporter of Self-Determination
- Independent Facilitator trained by The Guidelight Group
- Spanish-language PCT Trainer for ASLA's Advanced IF Training 2023

- **ASLA Team Members**

More than 50% of the ASLA staff are Person-Centered Thinking trained through The Learning Center for Person-Centered Practices.

44% of the ASLA team have one or two family members in SDP.

### 3. Key Contributors to RCOC Project

**CAROLA MARANON** is a mother of two amazing boys, aged 8 and 15, with Autism; both boys receive services from the Regional Center. She was born and raised in Bolivia, where she graduated with honors from Chemical Engineering at San Simon University. She also worked as a researcher at the Universidad Mayor de San Simon (UMSS) Agrotechnology Center for 4 years, and has a Master's of Science in Refining and Natural Gas treatment from the IFP French Institute of Petroleum Paris-France.

Carola, who speaks fluent Spanish, came to the United States in 2007, two years before her oldest son, who was diagnosed with autism at age two, was born. Four years after that, her younger son was also diagnosed with autism. Carola considers these events to have completely changed her life and since then, she has been dedicated to learning how to navigate the complex disability world.

As a mother herself with more than 10 years of experience in this world, she understands how hard this can be, and how lonely this journey can feel. She had learned to navigate systems like Special Education, Regional Center, In-Home Support Services, and health insurance; each one helping her to become a more effective advocate. Her personal journey in SDP began in 2015 when she became a member of Harbor Regional Center (HRC)'s Local Advisory Committee. Her sons transitioned to SDP in 2021; her children are now in their third year of SDP, and she has been an integral part of updating their plans and services throughout. While venturing out this way and finding new ways to shape the lives of individuals with special needs originally seemed daunting, she has been able to see the benefits of SDP every day in her own sons' lives. SDP has opened many doors for Carola's sons, and she sees it as a privilege to be part of helping others achieve their dream lives.

Carola completed 2 years of training via The Learning Rights Center's TIGER program, focusing on Special Education and rights under IDEA (the Individual with Disabilities Education Act). In addition, she has completed trainings on Person-Centered Thinking and holds IF certifications from the State Council of Developmental Disabilities, ASLA, Disability Voices United (DVU), and Guidelight Group. Carola is familiar with Developmental Disorders like Autism, as well as other related diagnoses like Sensory Processing Disorder, Sensory Integration Disorder, Developmental Coordination Disorder, Receptive and Expressive Language Disorders, and Dysarthria, as well as Mental Health diagnoses like Generalized Anxiety Disorder (GAD), Attention Deficit Hyperactivity Disorder (ADHD), Obsessive Compulsive Disorder (OCD), interoception and dual diagnoses.

Besides her private practice, Resilience Facilitation Services LLC, where Carola offers IF

Services for the SDP (both to participants entering the program for the first time and to those in subsequent years of programming, assisting with PCP updates, budgets, spending plans, etc.), she has also worked with Phoenix Facilitation of California on contracts via HRC and North Bay Regional Center (NBRC), and at ASLA as a Hispanic Community Moderator & Project Lead for their Multicultural IF training & IF Specialization series, where she is in charge of creating training materials and providing training to both new & experienced IFs in both English and Spanish. She has successfully transitioned multiple individuals speaking both English and Spanish into SDP, and looks forward to sharing those experiences with the trainees. Carola is currently a vendor across 6 Regional Centers for SC099 and SC024, and is respected by the community and leaders across California, including RCOC.

Phoenix Facilitation was founded by **NAOMI HAGEL**, a Torrance resident who holds a Master's Degree in Mental Health Counseling and is a Credentialed Person-Centered Thinking Trainer via The Learning Community for Person-Centered Practices. She also received training in the Self-Determined Learning Model of Instruction (SDLMI) via the University of California, Los Angeles (UCLA) and has previously studied the Liberty Plan model of Person-Centered Planning. Her status as a Person-Centered Thinking Trainer is a critical component of this project.

Naomi's passion lies in ensuring that all individuals with developmental disabilities have their rights respected and can access all services they are entitled to through generic and Regional Center funded sources. Naomi has a particular interest in working with historically underserved communities and those impacted by disparities in service delivery, as well as working with self-advocates. She brings extensive experience with dual diagnoses, psychotropic and psychiatric medications, the Department of Children and Family Services (DCFS), community resources, and the Regional Center system as both a former vendor director and a Program Manager within the Regional Center system itself. Between January 2020 and December 2021, Naomi led the charge and successfully onboarded approximately 48 individuals into SDP at South Central Los Angeles Regional Center (SCLARC). During her tenure, Naomi developed policies and procedures for all steps of the SDP process, including evaluating and determining HCBS compliance of service providers identified on the spending plan. Naomi assessed vendors and other disability-specific providers via self-assessments, direct communications with providers, and consultation with other professionals. She was able to increase interest in, and understanding of, SDP in the vendor community, which was further cemented through outreach and training at multiple VAC meetings and partnership with the SCLARC VAC Co-Chair. This process allowed Naomi to remove roadblocks to certain vendors providing SDP services.

Naomi's specialty is in utilizing the Person-Centered Planning process to find unmet needs and changes in circumstances that can impact budgets and potentially address systemic disparities in service delivery. She combines this talent with her knowledge of the Lanterman Act, Purchase of Service (POS) policies, generic resources, and SDP Waiver definitions to creatively match the identified needs with services that can be provided. By ensuring that policies are understood and followed, Naomi is able to accurately suggest and advocate for additional services when appropriate (such as increased respite hours, funding for social skills training, etc.) While this does maximize budgets, it also maintains cost-neutrality as required under the law. Naomi's Person-Centered approach to developing budgets was frequently praised by participants and other critical stakeholders, and she plans to encourage IF trainees to work in a similar positive manner. Overall, Naomi worked closely with not only participants and families but also Financial Management Service (FMS) agencies and IFs to develop templates, explain budgets, problem-solve, and ensure that services purchased on spending plans were appropriate and allowable per the waiver definitions and the Lanterman Act requirements. The relationships developed during this time are ongoing and will benefit the Person-Centered Plan training, as colleagues and peers may provide real-life examples and presentations to trainees on a variety of topics.

Naomi feels strongly that transparency is critical to building and maintaining strong relationships between the Regional Center and a participant and/or family, and she has found that collaborative, respectful, and consistently professional communication between all parties is essential to ensuring overall success. She has had great success with using plain language to explain the "why" behind decisions, which, even in times of disagreements, can decrease animosity, confusion, and distrust between parties, as well as the need for due processes and Fair Hearings. This is necessary and highly prioritized in both the budget development process, particularly when clarifying regarding whether funds may be added for a specific service and discussing rates for various services, as well as the spending plan process, in order to manage disappointment and frustration while ensuring purchases fall into the Lanterman Act definition of "services and supports for developmental disabilities." She plans to use a similar style when training the RCOC PCP training cohort, and to encourage the trainees to pass the information on in an understandable manner.

In her role at SCLARC, Naomi specifically increased outreach to the Spanish-speaking and Hispanic communities, recognizing the need for culturally and linguistically appropriate communications and understanding that "lost in translation" is a real concern. In order to enhance communication and SDP-specific connection with the RCOC community that does not identify as Caucasian, ASLA will have Spanish-speaking staff, which will increase language outreach and access. ASLA's diverse team also ensures understanding of the different cultural, systemic, socioeconomic, and socioemotional factors that impact the

service needs of the community, as well as abilities and ways which different groups access services and interact with the interdependent systems that individuals served by Regional Centers are entitled to receive services from. Throughout the PCP training, the ASLA team will seek to inform trainees about how to best manage the differing aspects they may encounter in their work.

Naomi is confident of her ability to assist with coordinating this proposal due to her extensive management experience. Throughout 18 years of management, she has managed up to 25 staff at one time in settings ranging from food service to psychiatric inpatient settings to day programs and a Regional Center case management unit. Naomi has been responsible for all aspects of employment, including utilizing creative recruitment methods that may ultimately assist SDP participants and IFs to find staff to meet needs. She supervised and guided dozens of Regional Center staff who were involved in SDP in multiple areas of the agency, including Community Support, fiscal, and case management, while simultaneously maintaining overall responsibility for a separate case management unit with up to 14 Service Coordinators and 1000 cases. She has also managed, participated in, been awarded, and/or overseen multiple Local Volunteer Advisory Committee (LVAC) contracts, including at Alta California Regional Center (ACRC), Frank D. Lanterman Regional Center (FDLRC), Harbor Regional Center (HRC), North Bay Regional Center (NBRC) and SCLARC. **The LVAC contracts have spanned across fiscal years and included tasks such as, but not limited to, participant and family coaching, staff coaching and training, IF coaching and training, vendor training, and other outreach, both in-person and virtually as needed.**

Since 2022, Naomi has continued her work with participants, families, and SDP via consultation, Person-Centered Planning, IF, and advocacy services that have thus far stretched across at least 17 of the 21 Regional Centers statewide. In this new venture, Naomi has worked with and created Person-Centered Plans for individuals ranging from two years old to adulthood, including those in the “transitional” stage wherein services shift from mainly generic resources to Regional Center providers. Previously, she has worked with all ages of Regional Center eligibility in her supervisory position over a “mixed-age” Regional Center case management unit, and she has further specific and direct experience with adults served by Regional Centers, including those who displayed challenging behaviors, through serving as a Program Director at a day program in Long Beach between 2015 and 2017. Her personal and professional experiences in this realm will allow her to share anecdotes and experiences that will benefit the PCP trainees from a real-life and less theoretical perspective.

Naomi’s experience with Phoenix Facilitation is also relevant to this project due to her provision of IF training, coaching, and mentoring both through and separate from LVAC contracts. She has supported multiple IFs with Person-Centered Plans, case

conceptualizations, appeals, complaints, budgets, spending plans, Financial Management Service (FMS) agencies, and other realities of the day to day complexity of the role. Her guidance has been sought out by professionals statewide, including by Regional Centers that have requested her to mentor less experienced providers. She has also previously collaborated with ASLA on IF Training, including via provision of Person-Centered Thinking training, participation in roundtable discussions, and review and editing of materials that will be repurposed for this training. She also developed the first-ever eight-hour training on the SDP portion of the Lanterman Act, presented in ASLA's fall 2023 IF training.

ASLA will benefit greatly from Naomi's many relationships and the connections she has made over the years working within the system. Due to her previous Program Director position, as well as her current, ongoing LVAC contracts, she is familiar with and trusted by families and staff members at the Regional Centers. Naomi proudly maintains relationships with Service Coordinators, management staff, and others within the agencies who can speak to the high quality of her work and her passion, and she is aware of who will be available to provide assistance during this project. Naomi previously maintained an SDP Community Email List with over 1200 members statewide, which was used to build a community of stakeholders including participants, family members, IFs, Person-Centered Planners (PCPs), traditional service vendors, and Regional Center staff from throughout the state. Naomi has been and remains a trusted resource on SDP and Regional Center matters to many of these stakeholders and plans to use those relationships and knowledge to forge connections and ensure professionals, individuals and families at RCOC impacted by this proposal are able to access and be informed of high-quality services.

**Bertha Taylor** wears many hats daily; she is a Board Certified Behavioral Analyst (BCBA) with a pediatric practice in San Diego, conducts Independent Educational Evaluations (IEE), is a Special Education advocate, and is a Certified trainer in Professional Crisis Management (PCMA). She also completed a 4-month program on Person-Centered Planning with Helen Sanderson Associates and is a bilingual certified trainer for Person Centered Thinking via the Learning Community for Person Centered Practices since 2022. Bertha has supported underserved communities in her area, providing information and support for many families. She has been a member for several years of the San Diego Regional Center (SDRC) Local Advisory Committee (LAC) and is a strong supporter of Self-Determination. Bertha presents regularly at international conferences on several topics and has trained the Department of Education in Mexico. Bertha is also an Independent Facilitator (IF) Trained by the Guidelight Group, but her proudest accomplishment is being the mother of an incredible young adult with neurodiversity and a former Court Appointed Special Advocate (CASA). One of her latest projects is to

collaborate on a presentation for the Association of Family and Conciliation Courts, California Chapter (AFCC-CA)

**KIM SINCLAIR** brings more than 30 years of experience in both corporate and non-profit environments. Her career includes Fortune 100 experience in business and information technology and contributions to a number of local non-profit organizations in the Los Angeles area. Since 2015, Kim has led ASLA as the Executive Director, empowering individuals with disabilities, their families, and professionals through advocacy, education and community support to ensure an equitable quality of life for all.

Even prior to her role at ASLA, Kim was no stranger to the developmental disability community; she has a personal mission to enable all people to "live their best life". Her son helped her navigate the disability community from a medical, educational and social perspective for the past 20 years. Kim has a Bachelor of Science degree in Computing and Bachelor of Business degree in Accounting from Monash University, Melbourne, Australia, and earned her MBA from Baylor University, Waco, Texas.

ASLA has served as a leader in the SDP realm since the inception of the program, co-authoring SB468, the SDP law and hosting multiple conferences and informational sessions. They have also sought to reduce disparities in service delivery for many years, through multiple different avenues. Kim and the ASLA team have substantial, varied, and valuable experience that will benefit the execution of this project, including their own status as parents of individuals with developmental disabilities (some of which are in the Self-Determination Program) and as community leaders. They have previously provided training on the Person-Centered Planning process, meetings, and the development of reports to IFs across the state of California. Their awarding and execution of grant proposals via Eastern Los Angeles Regional Center (ELARC), North Los Angeles County Regional Center (NLACRC), Harbor Regional Center (HRC), South Central Los Angeles Regional Center (SCLARC), Inland Regional Center (IRC) and the Department of Developmental Services (DDS) for IF Training, including short-term, beginner level, intermediate level, and long-term and advanced levels not only provides lessons that will strengthen the training provided to IFs via this project, but also multilingual and multicultural materials that can be repurposed, once made specific to RCOC.

Overall, since 2019, ASLA has trained over 600 culturally and linguistically diverse Independent Facilitators across all 21 Regional Centers, with over 200 specifically speaking languages other than English, through a total of four grants from DDS, one from ELARC, one from HRC, one from SCLARC, one from IRC and one from NLACRC. They have successfully completed training via Zoom and in-person, and partnered with the State Council for Developmental Disabilities (SCDD) for training and information provision regarding the Lanterman Act in the advanced training module. As part of their commitment to decrease disparities in service delivery, ASLA has and will continue to train prospective IFs to advocate for the unmet needs and changes in circumstances that can potentially impact a participant's budget, as well as ensure their familiarity with



traditional services available, and RCOC policies, so they can accurately identify what is positive and possible for each individual.

Under Kim’s guidance and leadership, ASLA has also completed 15 Person-Centered Plans in support of participants seeking SDP services, maneuvering through the process in multiple languages. ASLA’s support staff are familiar with unmet needs, changes in circumstances, and resources in a manner that can support participants, as well as IFs guiding individuals served and their families. They also bring to the project experience developing individual budgets and spending plans, as well as collaborating with FMS agencies and training IFs on these processes. ASLA’s strong relationships with FMS agencies are further highlighted by the presence of Victor Lira, the president of Aveanna Healthcare, one of the largest FMS agencies in California, on their board.

#### **4. Project Management & Coordination**

As demonstrated in Section 1 “ASLA Skills and Experience” ASLA has a proven track record of implementing project plans on time and within budget. With a seasoned team, supporting materials, knowledge areas, and delivery complemented by infrastructure and automation tools this project is within scope of ASLA’s experience to deliver.

In addition, ASLA has an experienced project coordinator with project management experience who works with project leads on deliverables and communication with trainees.

As ASLA’s Program Coordinator, **Jane Sakurai** brings experience in Program Management, Project Management, Contract Administration, and Marketing and Communications. Jane has a Bachelor of Science degree in Finance from Cal State University Dominguez Hills, and a Master of Business Administration and a Master of Health Services Administration from the University of Washington in Seattle, WA.

As a mother to three adult children, Jane is familiar with Autism, mental health and learning disabilities, and understands the challenges these pose to the individual and family. She strives to make a positive difference in the lives of not only her family, but all training participants who turn to ASLA for education and training.

At ASLA, Jane handles trainee communications and training material coordination and distribution, as well as data collection and reporting to contract agencies and DDS.

#### **5. Timeline and Scope of RCOC Person-Centered Planning (PCP) Training for Prospective and New Independent Facilitators Project**

ASLA will deliver the content. ASLA will seek out trainees from diverse backgrounds who are interested in providing Independent Facilitation services as a career, including and specifically to individuals served by RCOC. Potential trainees, who will preferably reside within RCOC’s catchment area, will be contacted and made aware of the opportunity via social media advertising, RCOC parent and vendor groups, and other creative avenues to ensure widespread notification. RCOC will be an active partner in recruitment. One focus will be on the recruitment and training of self-advocates and family members of individuals with developmental disabilities, with a particular emphasis on community members from historically underrepresented groups. Participants who self-identify as non-White and/or as speaking a language other than English will be prioritized. Outreach will aim to maximize equity across all regional center eligibilities

ASLA will provide training to this cohort, with training and materials available in English and Spanish (with a minimum of 5 participants required for services to be provided in Spanish).

ASLA can support 15 to 25 trainees in English and 15 to 25 trainees in Spanish, with a minimum of 5 participants required for services to be provided in Spanish. Additional non-minority/English-speaking trainees will be considered only if there is not sufficient interest from underserved communities. There will be a maximum of between 30 and 50 participants, with the understanding that due to the intensity of the training, natural attrition is anticipated.

### **Training Methods, Topics and Modules:**

ASLA's training is differentiated by:

- CORE language - for monolingual Spanish speakers this is essential to ensure accurate comprehension; too much is lost through translation.
- REAL de-identified cases - students learn best by exposure to real-life scenarios.
  - Case Studies present learning opportunities for students to relate on a personal level, enhancing information from lectures. This provides genuine learning experiences, which enriches comprehension.

ASLA has a proven track record training in PCT and complementing with real de-identified cases, where trainees receive 2 PCP walk-throughs. (See "Transformative" email feedback in Addendum 1.)

Training will be provided LIVE, via Zoom. Breakouts will include opportunities to review a case-study used throughout the series. Efficacy of the course will be determined via pre- and post-test completion.

Training topics and modules will include, but not necessarily be limited to the following.

- 1) **Person-Centered Thinking**, trainees will receive a full 16 hours of Person-Centered Thinking (PCT) training with certified instructors in English and Spanish with the Learning Center for Person-Centered Practices, with the curriculum customized for the day-to-day role and usage of an IF. This training will also take into consideration ways that Person-Centered Thinking (PCT) can and should be incorporated into traditional vendored services.

*NOTE: This content is typically not offered in Spanish CORE language; however, ASLA partners with a Spanish-speaking certified instructor through the Learning Center for Person-Centered Practices, and can offer this unique opportunity.*

- 2) **Exploring Person-Centered Plans (PCP);** introduction to real de-identified case studies, and practice applying the cases as examples to create two Person-Centered Plans (PCP), one for a minor and one for a young adult.

Delivery: Live Zoom delivery in core English (20 hours) and core Spanish (20 hours). Materials are provided in core language (English and Spanish) to assist with knowledge acquisition. ASLA believes delivering live in CORE English or Spanish language is critical for knowledge acquisition and sharing.

**Vietnamese Language Scope**

*If Vietnamese is selected, ASLA will provide training to this cohort, with training and materials available in English, Spanish and Vietnamese (with a minimum of 5 participants required for services to be provided in Spanish, and a minimum of 5 participants required for services to be interpreted and translated into Vietnamese).*

*With Vietnamese language ASLA can support 15 to 25 English/Vietnamese speakers as well as 15 to 25 trainees in Spanish, with a minimum of 5 participants required for services to be provided in Spanish and minimum of 5 Vietnamese speaking participants required for services to be interpreted and translated into Vietnamese. Additional non-minority/English-speaking trainees will be considered only if there is not sufficient interest from underserved communities. There will be a maximum of between 30 and 50 participants, with the understanding that due to the intensity of the training, natural attrition is anticipated.*

RCOC will be an active participant in recruiting Vietnamese trainees.

Vietnamese Delivery: Live Zoom delivery in core English with Vietnamese Interpretation (20 hours) and core Spanish (20 hours). Materials will be provided in core language (English, Spanish and Vietnamese) to assist with knowledge acquisition. Vietnamese would be via a preferred RCOC translator with RCOC experience; as there are NO trained Vietnamese speaking PCT trainers or materials via The Learning Community for Person-Centered Practices, the cost is very high. (See Budget for suggested alternatives.)

TASK	TIME
Contract creation and signing	2024 Q4
Advertise & recruit RCOC trainees in English and Spanish (and	2024 Q 4

Vietnamese - see Vietnamese scope above).	
Train Independent Facilitators in Person-Centered Thinking and PCP including pre/post testing and evaluation.	Training delivery January/February 2025 complete February 28, 2025
Present summary report	2025 Q1

**6. Outcome of project and Measures**

OUTCOME	MEASURE
Recruitment of 15 -25 English/Vietnamese Speakers (min 5 Vietnamese for training to support - See Vietnamese Language scope above) AND 15 – 25 Spanish Speakers.	Recruitment numbers
Training in CORE English (with Vietnamese translation and interpretation - 5 minimum if Language scope selected) AND CORE Spanish (plus materials)	<ul style="list-style-type: none"> <li>● 20 hours of training in CORE English and 20 hours in CORE Spanish. 40 hours total.</li> <li>● <b><i>Participants will be equipped with the tools to create, develop and present comprehensive PCPs.</i></b></li> </ul>
Summary report	Summary of pre/post results, evaluations, etc.

## 7. Project Budget

Total Cost : **\$65,000** commencing 2024 Q4 in English, Spanish and Vietnamese. Training will begin December/January and conclude February 2025.

Note:

- Life happens, and all attempts will be made to deliver in CORE English and CORE Spanish, but occasionally a translator needs to step in due to illness etc.(issues beyond ASLA’s control) in order to meet the project deliverable timeline, especially in tight timeframes like RCOC where there is very little contingency. Instructors in Spanish are engaged for 20 hours and instructors for English for 20 hours content.
- The budget below has a separate line item for Vietnamese translation and interpretation.
- ***The Vietnamese addition of \$32,500 is a considerable amount of money to spend on the Vietnamese speaking 4% of RCOC clients (English 78%, Spanish 16%) with a focus only on PCP training.***
  - ***ASLA recommends a 2 prong approach. Firstly, target bilingual Vietnamese language trainees who can understand English and utilize English materials and instructor; there are 25 English spots which they could have priority in. Secondly, RCOC LVAC determines if options below would be better value for expenditure for this segment of population:***
    - ***Monolingual Vietnamese participate in “Exploring Person-Centered Plans (PCP)” using case studies and tools for 6 hours with Vietnamese materials and interpreter in a small group of 5 (ASLA can quote this if meets community requirement) OR***
    - ***Determine alternative value add for the monolingual Vietnamese segment.***

BUDGET	PROJECT NAME: Person-Centered Planning (PCP) Training for Prospective and New Independent Facilitators - English & Spanish
LINE ITEMS	PROPOSED AMOUNT TO SPEND
RECRUITMENT AND TRAINING	\$32,500
VIETNAMESE Translation of materials & Simultaneous Translation	\$32,500
TOTAL PROJECT AMOUNT	<b>\$65,000</b>

Includes: Tools eg. Zoom, texting etc; Staffing, contract instructors, Interpreters (as needed) and project management and coordination of delivery.

## **ADDENDUM 1 - “Transformative” Feedback**

Email received on 3/28/24 from participant of ASLA’s current DDS SAE contract (22-c27) - Cross-Cultural Independent Facilitator Advanced Training Program, regarding Person-Centered Thinking training module:

*Dear ASLA Team,*

*I am writing to express my sincere gratitude for the transformative experience I have undergone during the 8-week person-centered training. Embarking on this journey has not only equipped me with essential skills but has also fundamentally altered my perspective on caregiving, person-centered planning, and interpersonal relationships.*

*(Trainer) guidance was invaluable. Her wealth of knowledge, coupled with her humor and genuine passion for person-centered care, served as a constant source of inspiration throughout the training. Her willingness to share personal anecdotes and insights added depth to the learning experience, making the journey both enriching and enjoyable.*

*One of the most profound aspects of the training was its ability to challenge preconceived notions and provoke introspection. The topics we delved into, such as important to and important for the individual, reframing reputations, and the whole person-centered planning kit, led me to reevaluate my approach and recognize the importance of honoring each individual’s unique identity, communication, and experiences.*

*The effectiveness of this training is evident in its tangible impact on my day-to-day practice. Armed with newfound knowledge and skills, I feel better equipped to navigate the complexities of caregiving with empathy, respect, and authenticity. The principles of person-centered care have become ingrained in my approach, whether it’s actively engaging clients in decision-making processes or creating environments that promote independence and well-being.*

*In conclusion, the 8-week person-centered training has been a profoundly enriching experience that has not only broadened my skill set but has also deepened my understanding of the fundamental principles of compassionate caregiving and person-centered planning. As I continue on my journey, I am grateful for the transformative lessons learned and the enduring impact they will undoubtedly have on the lives of those in my care.*

*Thank you once again for this incredible opportunity.*

*Sincerely,*

*(Confidential)*



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**Response to: Regional Center of Orange County.  
Self-Determination Local Advisory Committee  
Independent Facilitator Training RFP**

THE INDEPENDENT FACILITATOR TRAINING ACADEMY LLC.  
WWW.IFTRAININGACADEMY.COM  
Main Line: (800) 803-0869 Fax: (424) 832-2411  
[rosie@iftrainingacademy.com](mailto:rosie@iftrainingacademy.com)  
Direct line: 951-335-9242



**Project Type:** Person-Centered Planning (PCP) Training for Prospective and New Independent Facilitators

**Applicant:** Rosie Lasca, Owner of the Independent Facilitator Training Academy (IFTA)

**Project Duration:** October 1, 2024 - February 28, 2025

## Proposed Services

The proposed project aims to train 30 prospective and new Independent Facilitators (IFs) in the Regional Center of Orange County (RCOC) catchment area through a combination of asynchronous and synchronous training methods. Participants will be enrolled in IFTA's Complete Independent Facilitator Certification Training Course, which includes 25 comprehensive modules covering all aspects of the Independent Facilitator role and the Self-Determination Program (SDP). Key areas of focus include Person-Centered Thinking, Person-Centered Planning, Writing Effective Person-Centered Plans, Developing Spending Plans, and supporting participants throughout and beyond the SDP transition.

The online course is available 24/7, allowing participants to complete the training course and earn their certification at their own pace. The training will be supplemented by 11 live virtual review and practice sessions to provide interactive, real-time support and deepen participants' understanding of the course content.

The program will meet the diverse linguistic needs of the RCOC community by offering subtitles in English, Spanish, Korean, Tagalog, Vietnamese, and Chinese for the pre-recorded video modules of the Asynchronous training. Additionally, simultaneous interpretation will be provided in Spanish and Vietnamese during the live virtual Synchronous sessions. All materials and content incorporate the most recent updates from the Department of Developmental Services (DDS) to ensure compliance with current updates and directives.

## About IFTA

The Independent Facilitator Training Academy (IFTA) provides training and certification for Independent Facilitators (IFs) on the California's Self-Determination Program (SDP). Founded by Rosie Lasca, IFTA has a mission to empower facilitators, families, and individuals with disabilities through comprehensive training programs that promote self-determination and person-centered practices. IFTA has trained over 600 Independent Facilitators, including many who serve underrepresented and multilingual communities. [Click here](#) to view student impact statements/testimonials.

The IFTA team is composed of three highly qualified staff members who are all bilingual and experienced in the Self-Determination process. Each member has certification as an Independent Facilitator and extensive experience working with underserved populations in California. Rosie Lasca, the founder, has over 8 years of experience in the field and is a leading advocate for self-determination and equitable access to services. All staff members have over 5 years of experience in project management and are dedicated to ensuring project success.

The IF Training Course is designed with a focus on plain language and cultural sensitivity, ensuring that participants from diverse backgrounds can fully comprehend and engage with the material. IFTA has a long history of working on equity-based efforts and understands the importance of creating accessible content. We have continuously refined our curriculum based on feedback from past students, ensuring it helps individuals feel confident and prepared to provide Independent Facilitator services.

By using clear, straightforward language in our video modules and instructional materials, we cater to participants with varying literacy levels. Additionally, IFTA's commitment to cultural sensitivity is reflected in the course's multilingual support, which provides subtitles in English, Spanish, Korean, Tagalog, Vietnamese, and Chinese.

## Key Qualifications

IFTA, led by Rosie Lasca, brings extensive knowledge and hands-on experience with the Self-Determination Program (SDP) and Person-Centered Planning (PCP). Our training curriculum is grounded in the foundational principles of self-determination and person-centered approaches, ensuring that each facilitator is prepared to support individuals with developmental disabilities in making informed choices about their lives.

Over the past eight years, Ms Lasca has developed a strong track record of delivering competency-based training, particularly within the context of the Regional Center system. Our curriculum includes both introductory and advanced training modules, covering all aspects of independent facilitation, from understanding the Lanterman Act to mastering person-centered planning and developing spending plans under the SDP.

We pride ourselves on our ability to offer training that is both accessible and flexible, incorporating a blend of asynchronous online modules and live virtual sessions. IFTA has also worked extensively with underserved communities, ensuring that all participants, regardless of their language or cultural background, can fully engage in the training process.

### **Current and Previous Projects:**

- **North Bay Regional Center (NBRC), Regional Center of East Bay (RCEB) and Kern Regional Center (KRC) Contracts:** In 2024, IFTA was contracted by NBRC, RCEB, and KRC to provide Independent Facilitator training for individuals within their catchment area. These comprehensive training programs involved a combination of asynchronous online modules and live virtual sessions, with a strong focus on reducing disparities in access to services among linguistically and culturally diverse communities. IFTA trained over 79 students who completed the course and earned their certification.
- **SDCC Grant in collaboration with PESA 2024:** Self-Advocacy & Leadership Youth training for individuals between the ages of 16-22 with an active IEP or receiving Regional Center services in Los Angeles County offered in English and Spanish.
- **ALTA California Regional Center 2023-24 contract:** Self-Determination educational animated video series aimed to support individuals and families receiving Regional Centers to understand better the complexities of SDP available in English, Spanish, Russian, Hmong, and Punjabi.  
<https://www.youtube.com/playlist?list=PLZU-7iw72yqj8Qq77ZqYmPUO-Baadf4OL>
- **DDS 2020-2022 Grant:** ASLA Cross-Cultural Independent Facilitator Certification and Mentor Training Program. Rosie Lasca was one of the lead trainers and curriculum developers. Training was offered in English, Spanish, Mandarin, and Korean.
- **ASLA 2016-2019 Westside Regional Center DDS Grant Collaboration:** Parent Empowerment Project where Ms. Lasca trained 20 culturally diverse individuals on providing Parent to Parent support. Ms Lasca also worked on the production of the Regional Center Services educational video series. This project focused on decreasing Regional Center disparities in services for the Latino and African American communities. Collaborative Video project samples:  
<https://www.youtube.com/watch?v=LkOjZOfWuwE>

<https://www.youtube.com/watch?v=6N9r6mqVNfg&t=50s>

<https://www.youtube.com/watch?v=Bi80YcDZwhY&t=15s>

<https://www.youtube.com/watch?v=etB-L37gJm0>

## Training Materials & Resources

The academy offers a range of resources, from templates and cheat sheets to comprehensive guidebooks, catering to various learning styles and levels of expertise. IFTA's staff is bilingual in English and Spanish which ensures that linguistic diversity is addressed, further emphasizing the academy's commitment to differentiation. Moreover, the one-on-one coaching sessions provide personalized guidance, ensuring that individual learning needs are met.

Additionally, IFTA has published the **Complete Independent Facilitator Training Guidebook**, which serves as a valuable complement to the IF Training Course. This guidebook offers a more robust and detailed explanation of each topic covered in the 25-module IF Training Curriculum, enhancing understanding and application of the material for all trainees. This resource ensures that participants can access comprehensive information supporting their learning and professional development.

## Data Collection and Analysis

IFTA employs rigorous data collection and analysis methods to assess training programs' effectiveness continually. This feedback loop allows for constant curriculum refinement demonstrates IFTA's commitment to quality and efficacy in training delivery. Rosie's expertise in developing surveys pre and post-tests for certification programs ensures that learning objectives are clear and measurable.

With comprehensive skills and experience, IFTA and Rosie Lasca are exceptionally qualified to deliver Independent Facilitator Training that meets the complex needs of the Regional Center of Orange County and its diverse community. Our programs are crafted to empower individuals with disabilities through education, advocacy, and direct support, driving meaningful change and enhancing the SDP's impact.

## Project Introduction

The RCOC Independent Facilitator Training Program, led by Rosie Lasca and the Independent Facilitator Training Academy (IFTA), aims to address critical disparities in access to the California Self-Determination Program (SDP) by training 30 individuals from diverse racial, ethnic, and linguistic backgrounds within the RCOC catchment area. This comprehensive training program, running from October 1, 2024, to February 28<sup>th</sup>, 2025, combines the flexibility of asynchronous online learning with the interactivity of weekly synchronous virtual meetings.

Participants will benefit from IFTA's extensive experience and innovative training approach, which includes 25 detailed modules available 24/7 and personalized one-on-one coaching sessions. The training program is unique in its multilingual support, providing subtitles in Spanish, Tagalog, Chinese, Korean, and Vietnamese, ensuring inclusivity and accessibility for all participants. Additionally, the provision of hardcopy and e-book versions of The Complete Independent Facilitator Training Guidebook guarantees that participants have continuous access to essential resources beyond the training period.

This project is designed to empower participants to become effective Independent Facilitators, enhancing service access and reducing disparities in the SDP. By offering a blend of flexible online coursework and interactive virtual meetings, this training program ensures participants can learn at their own pace while receiving the support and guidance needed to succeed. The establishment of an alumni network further supports ongoing professional development and community building, creating a lasting impact on service quality and accessibility within the RCOC community.

## Objective

To train 30 individuals as Independent Facilitators (IFs) through a comprehensive, flexible program from October 1, 2024, to February 28<sup>th</sup>, 2025, using IFTA's existing online multi-language certification training course available 24/7 with 25 modules of intensive training content, supplemented by synchronous weekly live virtual meetings, one-on-one coaching, and ongoing support. This program aims to enhance access and reduce disparities in the California Self-Determination Program (SDP) for diverse racial, ethnic, and linguistic communities within the RCOC catchment area.

## Target population

The project will accommodate 30 individuals interested in providing Self-Determination Independent Facilitator services within the Regional Center of Orange County (RCOC) catchment area.

In keeping with our commitment to equity and cultural inclusion our target population aims to be inclusive of individuals from all cultural, racial, and ethnic backgrounds, with particular attention to underrepresented and historically marginalized groups. This includes, but is not limited to, Black/African American, Asian, Indigenous, Hispanic, Latino, Pacific Islander, and other members of diverse communities within the RCOC's catchment area and neighboring regions.

By embracing such a wide range of participants, this project seeks to ensure that new and prospective facilitators are not only well-equipped to serve the unique needs of their communities but also represent the rich diversity of the individuals they will support.

## Implementation Plan

### Project Timeline, Activities and Measures

**Project Duration:** October 1, 2024 – February 28, 2025

#### Activity 1: Recruitment and Enrollment

- **Timeline:** October 1 - October 31, 2024
- **Description:** Partner with local organizations and community leaders to recruit a diverse group of 30 participants. Develop and distribute recruitment materials through various channels (social media, community meetings, flyers).
- **Measure:** Number of participants recruited and enrolled (Target: 30 participants).

#### Activity 2: Initial Assessment and Orientation

- **Timeline:** October 1 – November 1, 2024
- **Description:** Administer initial assessments to gauge participants' baseline knowledge of SDP and IF roles (Pretest). Conduct an orientation session to introduce participants to the program, its objectives, and expectations.
- **Measure:** Completion of orientation session and initial assessments (Pretest) for all enrolled participants.

#### Activity 3: Provision of Training Materials

- **Timeline:** November 1 – November 15, 2024
- **Description:** Distribute The Complete Independent Facilitator Training Guidebook to all participants in both hardcopy and e-book formats. Ensure that participants have ongoing access to updated materials beyond the training period.
- **Measure:** Delivery and confirmation of receipt of training materials by all participants.

#### Activity 4: Asynchronous Online Training

- **Timeline:** October 15, 2024– February 13, 2025
- **Description:** Provide participants access to IFTA's Complete Independent Facilitator Certification Training Course, which includes 25 modules available 24/7. Ensure that participants can complete the course at their own pace. The course includes subtitles in Spanish, Tagalog, Chinese, Korean, and Vietnamese. See Appendix B for the complete curriculum sections and topics.
- **Measure:** Percentage of participants completing the online modules (Target: 90% completion).

### Activity 5: Synchronous weekly Virtual Meetings

- **Timeline:** November 14 – February 13, 2025
- **Description:** Conduct a total of 11 weekly 2 hour live virtual review and practice meetings, providing opportunities for content review, Q&A, and practical application exercises.
- **Measure:** Attendance and participation rate in weekly virtual meetings (Target: 100% attendance rate for all meetings).

### Activity 6: One-on-One Coaching Sessions

- **Timeline:** November 14 – February 13, 2025
- **Description:** Offer personalized coaching sessions to address individual questions and provide tailored support. Each participant will receive at least one coaching session during the training period.
- **Measure:** Number of coaching sessions conducted and participant satisfaction (Target: 100% of participants receive at least one session; 90% satisfaction rate).

### Activity 7: Final Assessment and Certification

- **Timeline:** February 13, 2025- February 28, 2025
- **Description:** Administer final assessments to evaluate participants' knowledge (Post-test) gain and readiness to serve as Independent Facilitators. Issue certifications to those who successfully complete the training program. A Training Survey will also be conducted to measure the effectiveness of the course, obtain students' feedback, and determine students' future intentions. This course is designed to allow students to earn their certification at their own pace. Students can earn their certification in 1 day or by end of project date, which helps meet students where they are based on level of skill and availability.
- **Measure:** Track the percentage of participants who complete the course within the designated timeframe, aiming for a 90% completion rate. Measure the improvement in participants' knowledge from pre- to post-assessment, with a target increase of at least 20%.

### Activity 8: Ongoing Support

- **Timeline:** Continuous beyond project end date
- **Description:** Provide ongoing support, professional development, and continuous learning opportunities. Participants will have access to their e-book materials and their student account on the LMS platform to allow for peer support, and continued interactions with the instructors. Students will have the ability to ask continued questions as they move forward into their IF journey.

## Activity 9: Final Report Preparation

- **Timeline:** February 13, 2025- February 28, 2025
- **Description:** Compiling the final report to provide a comprehensive overview of the project activities and outcomes. This report will include an application overview, selection summary, training outcomes, and recommendations for future training enhancements based on participant feedback and insights gathered throughout the project.
- **Measure:** Completion and submission of the final report by February 28, 2025

## Final Project Report

The final report will provide a detailed analysis and summary of the project's implementation and outcomes. It will include:

- **Application Overview:** A comprehensive quantitative analysis of all applicants, focusing on demographic characteristics, linguistic capabilities, and regional connections to establish a baseline understanding of the participant pool and their initial qualifications.
- **Selection Summary:** Detailed profiles of the candidates selected for the training. This section will cover the demographics, languages spoken, and participants' engagement and progression through the training modules.
- **Training Outcomes:** An assessment of the training results, including attrition rates, course completion statistics, and feedback from post-training surveys. This section will highlight the training program's effectiveness and participants' readiness to apply their new skills. It will also synthesize demographic data, participants' intentions post-training, and insights from one-on-one meetings, reviewing pre and post-test results, identifying knowledge gaps, and listing common questions raised during the course.
- **Recommendations:** Suggestions for future training enhancements based on participant feedback, notable testimonials, and an evaluation of the program's impact and areas for improvement.



## Project Summary

The RCOC Independent Facilitator Training Program will provide comprehensive training to 30 individuals interested in offering Independent Facilitator services within the Regional Center of Orange County (RCOC) catchment area. Participants will complete IFTA's 25-module online certification course, which covers key topics such as Person-Centered Planning, Developing Spending Plans, and supporting participants in the Self-Determination Program. The training will be delivered through a flexible online format available 24/7, supplemented by 11 live virtual review sessions with simultaneous interpretation in Spanish and Vietnamese. The program aims to equip culturally diverse facilitators to better serve the needs of their communities and will be completed by February 28, 2025.

Thank you for your consideration. Please email your written response to the project manager. We look forward to our collaboration.

### **The Independent Facilitator Training Academy LLC**

Rosie Lasca, owner and trainer

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Direct Line: [REDACTED]

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**Appendix A:** Project Budget

**Appendix B:** Course Training Topics

**Appendix C:** General Application Questionnaire

**Appendix D:** Project Specific-Questionnaire

## Appendix A: Project Budget

Item	Unit Cost	Quantity	Total Cost	Narrative & Justification
Course Access Cost	\$424	30 students	\$12,720	Provides 24/7 access to the 25-module online certification course, allowing participants to learn at their own pace.
Training Guidebook	\$150	30 guidebooks	\$4,500	Provides a comprehensive resource for participants during and after the course.
Shipping and Handling	\$18.50	30 guidebooks	\$555	Ensures all participants receive their guidebooks promptly. <i>(\$8.50 shipping + \$10.00 handling)</i>
Virtual Meetings (Weekly, 2 hours)	\$300 per meeting	11 meetings	\$3,300	Facilitates interactive Q&A and practice sessions, enhancing comprehension and engagement 2 hours each
Simultaneous Interpretation (Spanish & Vietnamese)	\$1,200 per session. (\$300 per interpreter, 11 sessions)	2 hours each sessions a total of 4 interpreter per session	\$13,200	Ensures language accessibility during the 11 live virtual sessions. Two interpreters per language (Spanish and Vietnamese) will provide simultaneous interpretation during each 2-hour session to ensure full engagement and understanding for non-English speaking participants.
One-on-One Coaching	\$150	30 hours (1 hr per student)	\$4,500	Provides tailored support to address individual needs and questions, ensuring participant success.
Administration Costs-	\$100	63	\$6,300	Covers all necessary administrative tasks to ensure smooth project implementation and effective monitoring and reporting of project outcomes. Administration Activities: <ul style="list-style-type: none"> <li>• Marketing and Promotion: Developing and distributing promotional materials.</li> <li>• Recruitment &amp; student progress: Coordinating with community organizations and managing student progress.</li> <li>• Data Collection and Analysis: Gathering and analyzing data from surveys, Pre and Post Test.</li> <li>• Final Project Reporting: Compiling all project data, insights, and outcomes into a comprehensive final report, including recommendations for future training programs.</li> </ul>
<b>Total Project Cost</b>			<b>\$45,075</b>	

## Appendix B: Course Training Topics

**Curriculum and Materials:** Training will include 25 modules on the following topics. The course training videos are pre-recorded and available 24/7. Students will have access to each module once they are enrolled in the course. Templates and important links for each section will be provided to assist the students on their journey as Independent Facilitators. The Curriculum is separated into six sections and offers subtitles in Spanish, Tagalog, Vietnamese, Chinese, and Korean.

### **Section 1: Self-Determination, The Foundation of Self-Determination**

- 1) Self-Determination Theory
- 2) Person-Centered Thinking
- 3) Self-Determination Law
- 4) Self-Determination Program Overview
- 5) The Difference between Regional Center Traditional System and Self-Determination Program Overview of SDP
- 6) Your Role as An Independent Facilitator

### **Section 2: Person-Centered Planning (PCP)**

- 7) Person-Centered Planning Process
- 8) Person-Centered Plan the Initial and Preplanning Meeting
- 9) Person-Centered Plan Approaches
- 10) Person-Centered Plan Meeting
- 11) Writing the Person-Centered Plan Report

### **Section 3: Regional Center Budget and The Spending Plan**

12. The Regional Center Budget
13. Regional Services and Unmet Needs
14. Developing the Spending Plan

### **Section 4: Self-Determination Transition**

15. The Individual Personal Plan (IPP) and SDP
16. Working with the FMS
17. Creating an Action Plan
18. Independent Facilitator Payment

### **Section 5: Independent Facilitator Services Beyond SDP Transition**

19. Hiring Staff
20. Next Year SDP Steps

### **Section 6: Getting Started**

21. Independent Contractor Requirements
22. Setting Up Your Business
23. Creating A Business Plan
24. Business Insurance
25. Independent Facilitator Contract

## Appendix C: GENERAL APPLICATION QUESTIONNAIRE

1. **Name of Applicant (Organization or Individual):**  
Independent Facilitator Training Academy (IFTA)
2. **Is Applicant an Independent Contractor / Sole Proprietor, Partnership, LLC, or a Corporation (indicate whether nonprofit or for profit):**  
LLC (for profit)
3. **Name of Primary Contact:**  
Rosie Lasca, Founder & Owner
4. **Email of Primary Contact:**  
[rosie@iftrainingacademy.com](mailto:rosie@iftrainingacademy.com)
5. **Telephone Number of Primary Contact:**  
9 [REDACTED]
6. **Address:**  
[REDACTED] Redondo Beach, CA 90278  
Mailing Address: [REDACTED]
7. **Website (if applicable):**  
[www.iftrainingacademy.com](http://www.iftrainingacademy.com)
8. **What percentage of the ownership of this business or of the total number of members of the Board of Directors are persons with developmental disabilities or cross-disabilities? What are the demographics of the Board of Directors and/or vested owners?**  
The Independent Facilitator Training Academy (IFTA) is a sole LLC member with full ownership by Rosie Lasca. The team consists of three bilingual staff members with extensive experience working in the Self-Determination Program (SDP) and supporting underserved and cross-disability communities. While the ownership does not include individuals with developmental disabilities, the focus of our work is dedicated to empowering individuals with disabilities and advancing self-determination.

**9. Describe your experience:****a. Working with persons with intellectual or developmental disabilities, including the scope of the services you have provided:**

IFTA has trained over 600 Independent Facilitators across California, specifically focused on supporting individuals with intellectual and developmental disabilities (IDD) through the Self-Determination Program. The services provided include training on Person-Centered Planning, Developing Spending Plans, and supporting participants in navigating the complexities of the Regional Center system.

**b. Working with underserved, unserved, or BIPOC communities:**

IFTA has a long-standing commitment to serving underserved and BIPOC communities, particularly through providing training in multiple languages and ensuring cultural sensitivity. We have worked extensively with underrepresented populations, offering training in English, Spanish, Korean, Tagalog, Vietnamese, and Chinese to ensure that facilitators from diverse backgrounds are well-equipped to serve their communities. Our projects have consistently focused on reducing disparities in access to services and resources for BIPOC and underserved individuals in the developmental disability community.

**c. With community outreach, training, and resource development:**

IFTA has extensive experience in community outreach and resource development, having partnered with various regional centers, including NBRC, RCEB, KRC, and ACRC. We actively engage with community organizations and families to raise awareness of the Self-Determination Program and Independent Facilitation services. Our training programs are designed with community feedback in mind, and we continuously refine our materials to meet the needs of the communities we serve.

**10. Describe your familiarity and experience with:****a. Use of plain language / universal design of learning (including drafting plain language materials and speaking in plain language):**

IFTA's training materials and course videos are specifically designed in plain language to ensure accessibility for all participants, regardless of literacy level or language barriers. We utilize a universal design of learning in both our pre-recorded and live training sessions to accommodate different learning styles. The course also provides subtitles in English, Spanish, Korean, Tagalog, Vietnamese, and Chinese, ensuring that participants can engage fully with the content. IFTA's commitment to plain language ensures that the material is straightforward, easy to understand, and culturally sensitive.

**b. Community resources, the regional center system, and other agencies who have a role in supporting people with intellectual and/or developmental disabilities:**

IFTA has extensive experience in community outreach and resource development, partnering with various Regional Centers, including NBRC, RCEB, KRC, and ACRC. In addition, IFTA partners with Community Based Organizations to develop training programs. In 2024, IFTA collaborated with **Parents, Educators/Teachers & Students in Action (PESA)**, an organization focused on empowering youth and families to build leadership and advocacy skills. Together, we developed a Self-Advocacy Video Training Series aimed at supporting individuals who receive Regional Center services or have an IEP to successfully advocate for themselves.

IFTA partners with **Being Built Together (BBT)**, a Korean parent-led organization, to provide support for the Korean-speaking community in accessing Regional Center services and generic resources. IFTA provides training on IHSS and SSI, helping families better navigate these critical support systems.

In 2023-2024, we collaborated with the **Exceptional Family Center of KRC** to deliver comprehensive training on the Self-Determination Program and the role of an Independent Facilitator. IFTA actively engages with community organizations and families to raise awareness about SDP and Independent Facilitation services, while continuously refining our training materials based on community feedback to meet the evolving needs of the populations we serve.

**11. List the project you are applying for under this RFP:**

Person-Centered Planning (PCP) Training for Prospective and New Independent Facilitators

**12. Provide us with the name and contact information (telephone, email address) of 3 professional references:**

1. Exceptional Family Center (EFC)

[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]  
[REDACTED]

2. Being Built Together (BBT)

[Redacted text block]

3. Integrated Community Collaborative

[Redacted text block]

## Appendix D: PROJECT SPECIFIC-QUESTIONNAIRE

1. **Your experience in SDP, including the name of the associated regional center(s) where you provide services.**

IFTA has extensive experience providing training for Independent Facilitators within the Self-Determination Program. We have worked with various regional centers, including NBRC, ACRC, RCEB, and KRC, providing IF certification training and educational video series for SDP.

2. **Your experience with Person-Centered Planning.**

Person-Centered Planning is a core component of our training curriculum. IFTA's 25-module course includes specific modules focused on Person-Centered Thinking, conducting PCP meetings, writing effective PCP plans, and supporting participants in the SDP transition. We emphasize practical, person-focused strategies to help facilitators empower individuals with disabilities to achieve their personal goals.

3. **List the relevant qualifications for the individuals who would be responsible for carrying out this project.**

- **Rosie Lasca** (Project Lead): Over 8 years of experience in Independent Facilitation and the Self-Determination Program trainer. With over 10 years of project management on equity based grant projects.
- **Two Project Coordinators**: Both have over 5 years of experience in project management and Independent Facilitation, with certifications in the SDP process. All team members are bilingual and have extensive experience working with underserved communities.

4. **Ability to maintain and monitor project plans, project schedules, work hours, budgets, and expenditures.**

IFTA uses a comprehensive project management system that tracks participant progress, project timelines, attendance at live sessions, and budget adherence. This system allows for efficient oversight of all deliverables, ensuring that deadlines, work hours, and expenditures are closely monitored and reported on.



**5. Outline the timeline for completion of tasks to ensure project deadline is met by February 28, 2025.**

- **October 2024:** Recruitment, enrollment, and orientation of participants.
- **October - December 2024:** Delivery of 25-module online course and 12 live virtual sessions.
- **January - February 2025:** Completion of one-on-one coaching sessions and final assessments.
- **February 2025:** Submission of final project report.

**6. Identify the anticipated outcomes of your project and how will you measure your success.**

The anticipated outcomes include the certification of 30 new Independent Facilitators trained to support SDP participants. Success will be measured through pre- and post-assessments, participant completion rates, feedback surveys, and the quality of their final PCP plans. We aim for a 90% course completion rate with measurable improvements in participants' knowledge and skills.

**7. Attach a one-page Project Budget showing how funds will be utilized. Please include separate line items for all planned expenditures.**

*See page 10, Appendix A: Project Budget*

## **Request for Proposal**

**From Self-Determination Local Advisory Committee for RCOC**

**Issued on November 6, 2023**

**Deadline for submission: May 30, 2024**

**Background:** Self-Determination Program Local Advisory Committees (SDP LAC's) were established by law to provide oversight of the Self-Determination Program (SDP) and make recommendations for improvement to each local regional center and the Department of Developmental Services. Periodically, funds are granted by the Department of Developmental Services (DDS) to the SDP LAC's and Regional Centers to support the implementation of the SDP. The SDP LAC for Regional Center of Orange County (RCOC) has prioritized the needs in the local area for the use of the first provision of funds, and is seeking proposals from interested parties to carry out the below project which the committee wishes to fund.

### **Project Proposal/Description: Person-centered Planning (PCP) Training for Prospective and New Independent Facilitators**

Person-centered Planning (PCP) gives the participant's agency to choose how they want to live their life, including what their goals are and what they need. The National Association of State Directors of Developmental Disabilities (NASDDDS) defined PCP as ... "a way to assist people who need support in their life to construct and describe how they envision their life, their goals, what they need, and how they prefer their needs be met, in order to include purpose and meaning in their life."

Proposals are being accepted that teach prospective and new Independent Facilitators (IF) how to conduct a successful PCP meeting and create an effective PCP plan for SDP participants of the RCOC. This training should take into consideration any and all DDS changes to SDP. The training may be conducted remotely via Zoom or in-person with the option for attendees to participate by Zoom. The training must be available in English, Spanish, and Vietnamese.

**Total funding available: TBD (approved by LAC on 4/29/2024)**

**Project must be completed by January 1, 2025.**

### **Application Instructions**

Submit the following documentation/information by May 30, 2024:

1. Application Questionnaire
2. Responses to the project-specific questions
3. Project budget

**GENERAL APPLICATION QUESTIONNAIRE**

*1. Name of Applicant (Organization or Individual)*

A. Norton Facilitation

*2. Is Applicant an Independent Contractor / Sole Proprietor, Partnership, LLC, or a corporation (indicate whether nonprofit or for profit)*

Independent Contractor - Sole Proprietor

*3. Name of Primary Contact*

Andrea Norton

*4. Email of Primary Contact*

██████████@gmail.com

*5. Telephone Number of Primary Contact*

██████████

*6. Address*

██

*7. Website (if applicable)*

<https://www.nortonfacilitation.com/>

*8. What percentage of the ownership of this business or of the total number of members of the Board of Directors are persons with developmental disabilities or cross-disabilities? What is the demographics of the Board of Directors and/or vested owners?*

Owner has cross-disabilities

*9. Describe your experience:*

- a. Working with persons with intellectual or developmental disabilities including the scope of the services you have provided*

I have been involved in the special education community throughout my entire life. I attended a reverse mainstream preschool alongside a close family member who has Intellectual Disabilities. I volunteered for the Special Olympics swim team throughout high school, worked as a lifeguard at Camp Able at Coronado, and taught swim lessons for children and adults with special needs. I

was the President of my high school's Best Buddies Club, and continued on with our own version of the club in college where I led the Best Friends program. I attended Cal Poly, San Luis Obispo where I earned my Bachelor of Science in Liberal Studies, MA in Special Education with an emphasis on Autism Spectrum Disorder, as well as my Education Specialist Credential Mild/Moderate Disabilities, California Single Subject Teaching Credential in Social Science and a Multiple Subject Teaching Credential with EL Authorization. I worked as an Education Specialist for 10 years in the San Dieguito Unified High School District after completing my master's degree. For the last 5 years, I have worked as an Instructor and Course Developer for the San Diego County Office of Education teaching and writing curriculum for courses in the Teacher Certification within the Teacher Effectiveness & Preparation (TEP) for the Education Specialist Intern Program, as well as teaching a course for an Added Authorization for Special Education program for Autism Spectrum Disorder and a course for a Certificate in Inclusive School Practices. I am a founding member and on the board of a local non-profit called Casa di Amici which works to support adults with intellectual disabilities since 2016. I received training and my certification as an Independent Facilitator through the Guidelight Group in the Spring 2022. I have been working as a small business owner supporting local families in Southern California by advocating for my clients and their families needs. My work as an Independent Facilitator is a true passion of mine. Through my work, I have the joy of seeing my client's lives change in a positive way and get to watch them flourish!

*b. Working with underserved, unserved, or BIPOC communities*

In 2008, I approached a local charitable foundation, Price Charities, and proposed to design, develop, and facilitate a youth summer program in an economically disadvantaged community with a diverse population, including many individuals who faced barriers to access support services. This community was composed predominantly of people of color, including many immigrants, many of which had limited English proficiency. For 10 years, I worked as the Summer Program Director providing a youth summer camp, completely free of charge to families to approximately 80 children residing in the community each year. I was able to utilize generic community resources to make the program educational and interactive. I also worked to secure grants to teach the participants how to swim. I also worked closely with local community members, even hiring staff from within the community which enabled us to better reach and connect with these unserved families.

*c. With community outreach, training, and resource development*

I have participated in Self-Determination Program Local Advisory Committee meetings. I attend frequent conferences to continue learning and connect with others in the community. I have collaborated with others within the field including service providers, families, vendors, FMS's, and colleagues in Independent Facilitation.

*10. Describe your familiarity and experience with:*

- a. Use of plain language / universal design of learning (including drafting plain language materials and speaking in plain language)*

- b. *Community resources, the regional center system, and other agencies who have a role in supporting people with intellectual and/or developmental disabilities*

As a special education teacher I am well versed and trained in universal design for learning. In both the courses I teach to adult interns, as well as the classes I taught to students with special needs, all of my instruction is created in a way that is accessible to a variety of learners. By working as an IF, I frequently am using layman terms, reducing the use of acronyms, and providing visual supports to help families and clients understand the sometimes difficult to understand processes required in transitioning to the Self-Determination Program.

*11. List the project you are applying for under this RFP*

Recruitment/Training of Independent Facilitators – associated with increasing the number of available independent facilitators with a focus on independent facilitators who are bilingual and bicultural. This could include, but is not limited to, recruitment, development and/or provision of training, translation/interpreters, costs related to the provision of training, etc.

*12. Provide us with the name and contact information (telephone, email address) of 3 professional references*

[REDACTED]

[REDACTED]

[REDACTED]

## **PROJECT SPECIFIC-QUESTIONNAIRE**

In addition to responding to the general application, please answer the supplemental questions below on a separate paper:

1. *Your experience in SDP, including the name of the associated regional center(s) where you provide services.*
  - o I received training and my certification as an Independent Facilitator through the Guidelight Group in the Spring 2022. I have been working as an IF supporting over 30 local families in Southern California providing transition support into the Self-Determination Program, as well as ongoing facilitation support. I work with and have clients at San Diego Regional Center, Regional Center of Orange County, and Inland Regional Center.
2. *Your experience with Person-centered planning.*
  - o I began person-centered planning for my students with special needs as an Education Specialist in the classroom to help support transitioning age students. I have now been Person-Centered planning to support the transition to the Self-Determination Program for two years. I have created over 30 Person-centered plans for a range of ages, level of needs, and varying communication styles.
3. *List the relevant qualifications for the individuals who would be responsible for carrying out this project.*
  - o Translators with experience in the special education field
  - o Parent of an SDP Participant who has gone through the transition process
4. *Ability to maintain and monitor project plans, project schedules, work hours, budgets, and expenditures.*
  - o I successfully support approximately 30 clients as an IF, all in varying stages of either transitioning into SDP, actively participating in SDP, or transitioning to a new year of SDP. Through this experience I have had the opportunity to track spending, balance budgets, maintain project schedules and timelines.
  - o As a special education teacher, I maintained and completed IEPs & triennial assessments, supported student's accommodations, and implemented services as a case manager for 28 students each school year.
  - o As a Summer Program Director, I hired and managed staff, maintained a schedule, prepared the budget, and planned & executed all activities.
5. *Outline the timeline for completion of tasks to ensure the project deadline is met by January 15, 2023.*

- o **June 2024-** Training Materials Development; Design and formatting of the materials.
- o **July 2024-** Professional translation of training materials into Vietnamese and Spanish; Proofreading and editing of translated materials; advertise training
- o **August 2024-** Record Training: Create a virtual resource library to accompany training materials for participants to refer back to or take the class as a self-paced version; English, Vietnamese and Spanish available in Recorded and Digital formats; advertise training
- o **September 2024-** Use translated material to connect with prospective and new Independent Facilitators, with an emphasis on those who are bilingual and bicultural
- o **October 2024-** Hold first session of training: 4 weeks of 2 hour sessions via Zoom; offered in English and Spanish with live interpretation
- o **November 2024-** Hold second session of training: 4 weeks of 2 hour sessions via Zoom; offered in English and Vietnamese with live interpretation; make changes and improvements based off of anonymous feedback from first session's participants
- o **December 2024-** analyze effectiveness of training by following up with previous participants; create presentation of the effectiveness of the training course using data collection to report back to RCOC, DDS, and the SDP LAC on results of the project

6. *Identify the anticipated outcomes of your project and how you will measure your success.*

- o Anticipated outcomes: train approximately 16 prospective and new Independent Facilitators, 50% or more of which will be bilingual and/or bicultural, on how to conduct a successful PCP meeting and create an effective PCP plan for SDP participants of the RCOC.
- o Success will be measured by:
  - surveying participants and how they identify
  - comparing pre-training and post-training surveys to measure growth made from the course in skills and understanding of Person-centered Planning
  - surveying participants after the end of course to see how they have used their new skills

7. *Attach a one-page Project Budget showing how funds will be utilized. Please include separate line items for all planned expenditures.*

- o Please see attached.

Proposed Project Budget				
<b>Project Proposal/Description:</b>	<b>Person-centered Planning (PCP) Training for Prospective and New Independent Facilitators</b>			
<b>Project Applicant</b>	<b>A. Norton Facilitation</b>			
<b>Prepared By:</b>	<b>Andrea Norton</b>			
	<b>From</b>	<b>To</b>		
<b>Project dates:</b>	<b>June 2024</b>	<b>1/1/2025</b>		
<b>Expense category</b>	<b># of units</b>	<b>Estimated Hours</b>	<b>Cost or Rate (\$)</b>	<b>Amount</b>
<b>Training Materials Development</b>	250 pages	160.00	\$80.00	\$12,800.00
<i>Content creation for the training materials; Design and formatting of the materials. Training Documents: Pre-Planning Workbook &amp; Questions; Additional Resource List (Online, Books, Videos); Common Approaches to Person Centered Planning; Several Samples of different style PCPs; Checklists of Things to Consider: When planning for Employment, Living, for Staff; Understanding the Circle of support; Getting Ready for the meeting: Pre-meeting, During meeting, Post-Meeting; Participation in the PCP; Rights, responsibilities, grievances, and laws; Self Advocacy; Vocabulary &amp; Key Words; Reflection worksheet &amp; Surveys; Sample Invitation to PCP Party; Sample Agendas; POV guide: When to use 1st vs 3rd person in the PCP; PCP template; Writing quality Goals in PCP; What to avoid when creating a PCP; Creating Action Steps; Identifying Supports; Review and Editing the PCP; Using the PCP to align with RCOC services; Works Cited.</i>				
<b>Translation of Training Materials into Spanish and Vietnamese</b>	500 pages	160.00	\$80.00	\$12,800.00
<i>Professional translation of training materials and curriculum described above into Spanish &amp; Vietnamese (estimate 80 hours for each language). Proofreading and editing of translated materials.</i>				
<b>Live Virtual Training Sessions</b>	8 weeks for 3 hours/wk	24.00	\$80.00	\$1,920.00
<i>Two cohorts of once a week live virtual training sessions for 2 hours for 4 weeks; plus set up and closing time (1 hour per session) for a total of 8 sessions</i>				
<b>Live Translation for Virtual Training Sessions (Spanish &amp; Vietnamese)</b>	8 weeks for 3 hours/wk for each language	48.00	\$80.00	\$3,840.00
<i>3 hours once a week for each cohorts (8 weeks total). One cohort will have Spanish interpretation, the other cohort will have Vietnamese interpretation.</i>				
<b>Video Recordings (in English, Spanish, and Vietnamese)</b>	25 hours of recording time for each language	75.00	\$80.00	\$6,000.00
<i>Video record curriculum explanations and create a virtual resource library to accompany training materials for participants to refer back to or take the class as a self-paced version</i>				
<b>Training Follow-Up</b>	1 hour per participant	20.00	\$80.00	\$1,600.00
<i>Follow-up sessions/ consultations for each participants. Monitoring and support for implementing Person-Centered Plans. 1 hour touch-base meeting for questions and concerns, plus four hours for scheduling time.</i>				
<b>Community Outreach</b>	30 hours	30.00	\$80.00	\$2,400.00
<i>Use translated material to connect with prospective and new Independent Facilitators, with an emphasis on those who are bilingual and bicultural</i>				
<b>Evaluations &amp; Feedback</b>	40 hours over course of 6 months	40.00	\$80.00	\$3,200.00
<i>Surveys or evaluation forms creation and distributed. Data analysis of feedback received. Incorporating feedback into future training sessions. Also use to create a presentation for stakeholders (RCOC, DDS, and the SDP LAC) on results of anticipated outcomes.</i>				
<b>Administrative Costs</b>	40 hours over course of 6 months	40.00	\$80.00	\$3,200.00
<i>Project management and coordination.</i>				
<b>TOTAL</b>		<b>597.00</b>		<b>\$47,760.00</b>





# GUIDELIGHT GROUP

## **Proposal to Self-Determination Local Advisory Committee for Regional Center of Orange County (RCOC) for Person-Centered Planning and Person-Centered Thinking Training for Prospective and New Independent Facilitators**

**September 23, 2024**

### **General Application Questionnaire**

1. Guidelight Group, LLC
2. Guidelight Group is a Limited Liability Corporation (LLC)
3. Sonni Charness, Owner and Founder of Guidelight Group;  
Debra Jorgensen, Director of Training and Innovation, Guidelight Group
4. [sonni@guidelightgroup.org](mailto:sonni@guidelightgroup.org); [debra@guidelightgroup.org](mailto:debra@guidelightgroup.org)
5. 3 [REDACTED] (Sonni); [REDACTED] (Debra)
6. [REDACTED], Los Angeles, CA 90064  
(Note: Guidelight Group serves clients and trains individuals from across the State of California with a heavy presence in southern California.)
7. [Guidelightgroup.org](http://Guidelightgroup.org)
8. As an LLC, Sonni Charness is the sole owner of the company and Guidelight Group does not have a Board of Directors. Sonni does not identify as a person with a disability, however Guidelight Group employs and trains many individuals with disabilities.
9.
  - a. Guidelight Group is recognized as a leading provider of person-centered planning, independent facilitation services and independent facilitator training programs across California. It was one of the first organizations established in the state specifically to serve and promote the Self-Determination Program (SDP). Since 2018, our team has supported

over 75 Self-Determination clients across 12 regional centers, including the RCOC. Our facilitators, all of whom have personal connections to the disability community, assist clients with developing person-centered plans, advocating for their needs, transitioning into the Self-Determination Program, and supporting them to implement their person-centered plans. We guide each of our clients through a person-centered planning process to update their plans each year. As many of them have been with us for four or five years, our team has facilitated hundreds of person-centered plans.

Guidelight Group utilizes its expertise in supporting clients in SDP to teach *The Essential Independent Facilitator Training Program* - the first and most reputable intensive independent facilitator training program in California. Since the inception of this program in 2020, Guidelight Group has trained over 180 independent facilitators (IFs) through this eight-week training program, which will start its 13<sup>th</sup> cohort in October 2024. (See project specific questionnaire for further explanation.) The course is taught by Sonni Charness and Debra Jorgensen, whose professional backgrounds and qualifications are detailed on the project specific questionnaire.

- b. Guidelight Group is deeply committed to working with underserved, unserved, and BIPOC communities. Our diverse team includes persons of color and with disabilities, and we currently provide services in Korean, Armenian and English. More than half (53%) of Guidelight Group's clients are AAC-users, self-advocates without family support, BIPOC, or speak a language other than English as the primary language in the home. Our approach is to meet these individuals where they are, ensuring that cultural, linguistic, and communication needs are respected and integrated into the person-centered planning process. We work to empower individuals who have traditionally been marginalized within the disability services framework, creating inclusive environments where their voices are heard and valued.

Guidelight Group recognizes that to reduce disparity, individuals and families need to have the option to be supported by people who speak their language and understand their community. We actively train other facilitators (IFs) to serve diverse populations, integrating best practices for person-centered planning for individuals who come from diverse cultural backgrounds or face other barriers to accessing services and the community into all of our training. We have successfully completed multiple grant-funded projects to train more than 60 individuals in person-centered planning and independent facilitation who can fill this need. Of the individuals who have completed the program, 33% have

received scholarships funded by various regional center Local Volunteer Advisory Committees implementation funds to provide services in languages other than English and to serve underserved and unserved communities.

- c. Guidelight Group excels in community outreach, training, and resource development, both as direct service providers and as educators. Through our *Essential Independent Facilitator Training Program*, we have trained over 180 facilitators, enhancing the capacity of the statewide network to support individuals in SDP. As a result of our community outreach and network, every cohort of our program since 2020 has reached maximum enrollment capacity. Our outreach efforts for similar grant-funded projects have typically yielded roughly twice as many qualified applicants as spots available for training, allowing us to enroll linguistically and culturally diverse groups of trainees whose backgrounds reflect those of underserved communities within the regional center's catchment area.

For example, San Diego Regional Center (SDRC) contracted Guidelight Group to train 37 diverse individuals to provide person-centered planning and independent facilitation to underserved and unserved communities. We received 100 applications for 37 spots and selected the group to best meet the needs of the local community. In sum:

- 31 out of 37 individuals trained had other language capacity, including Spanish (18), Hmong (1), Korean (2), Mandarin Chinese (3), Kannda, Hindi, Urdu, other Indian languages (2), Portuguese (1), Cantonese (1), American Sign Language (ASL) (5), Russian (1), Armenian (1), Japanese (1), Vietnamese (1), and French (1).
- 9 out of 37 self-identified as individuals with disabilities, and
- 4 out of 37 identified as African-American.

As part of this SDRC scholarship program, Guidelight Group trained a cohort of five independent facilitators in a rural and underserved portion of the county that is predominantly Spanish-speaking. Guidelight Group continues to convene and work with that small IF group to facilitate awareness about SDP and support new clients. This extra mentoring and support is central to the growth with SDP that is now happening.

Similarly, at Harbor Regional Center (HRC) we offered 20 scholarships also directed to those who represent an underserved, minority, or BiPOC community, or speak a language other than English. We received 40 applications and selected the 20 best candidates. In sum, 17 out of 20 individuals have other language capacities including Spanish (9), Chinese (both Cantonese and Mandarin) (6), Korean (1), Japanese (1), French (1)

and African-American (1).

Guidelight Group maintains strong relationships with local and regional organizations, including regional centers and community-based service providers, to raise awareness about SDP, person-centered planning, and the role of independent facilitators. Additionally, we are proactive in developing resources to support the broader disability community, including materials and training on effective person-centered planning and the Self-Determination Program. Our team members regularly engage as content experts in presentations, webinars, podcasts, and conferences to share knowledge and best practices, with the aim of creating a more inclusive and effective system of support for all individuals with I/DD. We have provided multiple trainings for Disability Rights California attorneys and advocates on the Self-Determination Program. We also collaborate with organizations such as Ally Comprehensive Services, which specializes in training and outreach to Latino communities, to train and support independent facilitators serving Spanish-speaking individuals and families.

10.

- a. Guidelight Group is adept at translating complex information into accessible plain language and utilizing universal design in its approach to teaching. Sonni Charness, Guidelight Group's lead trainer, has a Master's of Education in Special Education where she received extensive training in universal design of learning and differentiating instruction for diverse learners, and these practices are intentionally woven into our approach.

Guidelight Group maintains a library of plain language resources that we have developed for our training participants. Some examples of materials created in plain language are as follows: a reference sheet explaining each of the DDS directives in plain language; a plain language "cheatsheet" translation of the statute; sample scripts, templates and checklists for each part of the person-centered planning process including common questions to ask during pre-planning; tools offering different ways to structure a PCP meeting; and a customizable template for writing a person-centered plan.

In addition to grant projects with San Diego Regional Center and Harbor Regional Center to train communities of bilingual and multilingual independent facilitators to serve their regions, Guidelight Group previously worked with San Gabriel Pomona Regional Center to create a set of plain language videos and tools for those wanting to learn about and enter SDP, see the link here:

<https://www.sgprc.org/clients-families/self-determination-program/sdp-training-opportunities>.

Guidelight Group stays current on all best practices in person-centered planning and Person Centered Thinking, SDP-related changes in law, new Directives and FMS practices, and continually revises its training materials with plain language descriptions and visual aids to assist in learning the material that is not always easy to understand. We appreciate how complex the Self-Determination Program can be, and we provide tools and resources that simplify the concepts. We have trained self-advocates, individuals with other disabilities, and individuals with limited English capacity. We work with trainees to provide accommodations that will be effective, and we can translate the captions from the training sessions into nearly any language (using Google translate) as an aid to learning. We also offer coaching calls during training and for the first year to reinforce the material and training when applied to real clients and situations.

- b. The Guidelight Group team has extensive knowledge of community resources, the regional center system, and other agencies supporting people with intellectual and/or developmental disabilities. Sonni Charness was formerly Director of Adult Services at a regional center vendor agency, and spent her career before that in various roles within the service provider community where she accrued a wealth of knowledge in the regional center service system. Debra Jorgensen was formerly a staff attorney at Disability Rights California, where she focused on issues in the statewide disability service systems, gaining expertise in not only the regional center system but other generic resources. Guidelight Group also works with organizations like State Council, Disability Rights California, Disability Voices United, SDSU Interwork Institute, Thompson Policy Institute on Disability and Autism and other community partners on various projects.

Guidelight Group works particularly collaboratively with Disability Rights California. Our team has provided multiple training sessions to their staff attorneys and advocates on the Self-Determination Program. We have also worked with Disability Rights California to create specialized training opportunities for the independent facilitators in our alumni network. One such training was a six-part series on generic resources such as Medi-Cal, IHSS, and HCBA Waivers, and how they intersect with use of funds through SDP. In another training series, Disability Rights California staff presented on systemic barriers within SDP, and effective ways for independent facilitators to support clients facing such barriers, including the fair hearing process.

As independent facilitators, we support our clients to access generic resources (including SSI/SSDI, Department of Rehabilitation, and IHSS)

as well as a vast array of community resources, both within and outside of common disability services. Both Sonni and Debra also have experience with customized employment and other employment supports, including partnering with the Department of Rehabilitation as the generic resource, and using blended funds to create real work outcomes for many of our clients in SDP.

11. Guidelight Group is applying for the following project: ***Self-Determination Local Advisory Committee for RCOC's Person-Centered Planning (PCP) Training for Prospective and New Independent Facilitators***

12. Professional References:

1. Tim Jin, [tim@jinonline.net](mailto:tim@jinonline.net) (email preferred)

2. Vivian Huan, Senior Policy Attorney, Disability Rights California:  
[Vivian.Haun@disabilityrightsca.org](mailto:Vivian.Haun@disabilityrightsca.org); (213) 213-8049

3. Bernice Perdomo-Chavez, Participant Choice Specialist-Bilingual,  
Harbor Regional Center: [Bernice.Chavez@harborrc.org](mailto:Bernice.Chavez@harborrc.org); (310) 543-0163

## **Project Specific Questionnaire**

1. As described in more detail above, Guidelight Group independent facilitators have supported over 75 Self-Determination clients across 12 regional centers, including at RCOC. 53% of Guidelight Group's clients are AAC-users, self-advocates without family support, BiPOC, or speak a language other than English as the primary language in the home. Guidelight Group is not vendored with any regional centers, but we handle initial person-centered planning and pre-enrollment transition supports under the reimbursement code. Our primary client base are individuals who need ongoing independent facilitators for their subsequent years in the Self-Determination Program.

Guidelight Group utilizes its expertise in supporting clients in SDP to teach *The Essential Independent Facilitator Training Program* - the first and most reputable intensive independent facilitator training program in California. Since the inception of this program in 2020, Guidelight Group has trained over 180 independent facilitators (IFs) through this eight-week training program, which will start its 13<sup>th</sup> cohort in October 2024. The course is taught by Sonni Charness and Debra Jorgensen, whose professional backgrounds and qualifications are detailed below.

The central teaching through the course is how to facilitate person-centered planning for SDP participants and those who choose to transition into SDP. We then take a deep dive into how the person-centered plan informs both budget and spending plan discussions, and ultimately how annual person-centered planning helps create a self-determined life. During the course, participants practice person-centered planning with a mock client, including pre-planning, writing person-centered goals, processing how those goals might translate to traditional regional center services for budget development, and creating a spending plan based on the person-centered plan and budget. As we teach in the course, *everything* in SDP stems from person-centered planning and thinking. Guidelight Group also has on staff two individuals who are certified Person-Centered Thinking trainers.

Guidelight Group's *Essential Independent Facilitator Training Program* includes over 22 hours of instruction, eight workshop sessions, group coaching and individualized coaching to support new independent facilitators as they begin working with clients, access to an extensive and curated resource library, customized tools and templates to use in practice, an active alumni support community, and opportunities for advanced trainings in topics such as generic and natural resources, person-centered thinking, innovative client services and providers, and much more. Because we are the largest and most experienced team of IFs leading a training like this, and we are able to speak firsthand and use real life examples to bring the material to life.

Guidelight Group has been successful in developing seamless and collaborative processes and positive working relationships with regional centers across California to support SDP clients. We have also completed grant-funded projects in collaboration with SDRC, HRC, and SGPRC. We believe that this high level of collaboration is necessary for SDP to be a success across California and to serve the needs of the clients of RCOC specifically.

2. Since 2018, Sonni Charness has led or supported with the person-centered planning and SDP transition processes for all 75+ Guidelight Group clients before growing the team to include more IFs who she supervises and supports. Starting in 2020, Debra has led both the initial and annual person-centered planning processes for 15+ clients, in addition to mentoring and supporting others on the staff through the process. As co-instructors, Sonni and Debra have trained over 180 independent facilitators in person-centered planning, and provide ongoing coaching to all alumni related to person-centered planning and its use in the Self-Determination Program.

Guidelight Group also has on staff two individuals who are certified Person-Centered Thinking trainers. Through this grant, if awarded, scholarship recipients can be trained in Person-Centered Thinking in addition to the person-centered planning training through Guidelight Group's *Essential Independent Facilitator Training Program*.

3. Guidelight Group's training programs are led by Sonni Charness and Debra Jorgensen. Sonni Charness is the founder of Guidelight Group. She is a leading voice on the Self-Determination Program. She was a featured expert at the Statewide Conference on the Self-Determination Program in 2019, 2021 and 2022, where she presented on person-centered planning, individual budgets and spending plans, the future of SDP and independent facilitation, and other topics. Sonni is a regular contributor to webinars and other presentations organized by Disability Voices United. Sonni was a panelist on a Disability Voices United statewide webinar on navigating the Self-Determination Program during the coronavirus pandemic, and has been a regular presenter on their "SDP Connect" online technical assistance series for SDP participants.

Sonni has a Master's degree in Special Education, specializing in individuals with moderate to severe disabilities. In addition, she has completed the following trainings and certifications: Person-Centered Thinking, State Council on Developmental Disabilities Independent Facilitator Training, Westside Regional Center Local Advisory Committee 2-Day Independent Facilitator Training, Certified Employment Support Professional (CESP). She created Guidelight Group's Independent Facilitator Training Program and has led it twelve times.



Sonni led or supported with the person-centered planning and SDP transition processes for all of Guidelight Group's clients before growing the team to include more independent facilitators who she supervises and supports. Prior to starting Guidelight Group, Sonni spent her career in nonprofit service provider agencies. Her last role before starting Guidelight Group was the Director of Adult and Transition Services at a regional center vendor agency.

Debra Jorgensen is an independent facilitator, the Director of Training and Innovation at Guidelight Group and co-instructor of The Essential Independent Facilitator Training Program. Debra brings over two decades of disability knowledge and expertise to her role. She has worked in the field of disability, employment, and public interest law for over 20 years. Debra has presented on various topics related to self-determination, employment, and the role of the independent facilitator at the 2022 and 2023 San Diego Regional Center SDP Conferences; 2022 Bridges to the Future V conference; Disability Voices United's 2021, 2022 and 2023 statewide conferences; various DVU SDP Connect webinars; the Supported Life Conference; and has been a featured speaker on SDP for local disability support groups, as well as transition-age client groups.

Debra has facilitated dozens of person-centered plans and actively serves clients across various stages in the SDP process from transitioning into the program for the first time, to clients in their fourth and fifth years of SDP. Debra's clients span eight different regional centers, where she has collaborated with regional center staff to address client concerns and find successful outcomes for clients. Many of Debra's clients use AAC or other communication devices and she has developed person-centered planning practices that ensure the individual drives the process and has their voice heard at every step of the process. Her techniques have been used by fellow independent facilitators to ensure that even those clients whose voices have traditionally not been heard or valued, are able to access SDP, drive the process, and plan for their community inclusion. Debra educates existing service providers and other government-based service providers, like Department of Rehabilitation, about the Self-Determination Program and the needs of clients. She has also created innovative, pilot programs and partnerships with new and existing providers to best serve Guidelight Group clients in their quest for effective and high-quality community-based services.

Debra is a member of the Board of Directors for California APSE, the state chapter of the nation's leading advocacy organization promoting employment for people with disabilities. She is also a member of San Diego's Local Advisory Committee on Self-Determination Program (SDP) implementation and the Cardiac Family Advisory Council at Rady Children's Hospital. Debra is trained in Customized Employment by the Association of Community Rehabilitation Educators (ACRE), Person-Centered Thinking and Independent Facilitation. Debra earned her bachelor's degree from the University of California at San

Diego, and her law degree from the University of San Diego School of Law. She was also an Adjunct Professor at University of San Diego School of Law.

4. Guidelight Group has offered its *Essential Independent Facilitator Training Program* since 2020 and Sonni and Debra dedicate a portion of their time to this unique and high-quality training program that is offered 3-4 times each year. We have crafted our time and engagement with clients and other job duties to account for this. Guidelight Group has 3 training courses planned for 2025 and a refined and effective method for advertising, marketing, recruiting and determining scholarship applicants. All similar grant projects with other regional centers have been completed on time and within budget, with zero complications.
5. If Guidelight Group is awarded the grant funds and a contract is in place, we can immediately begin advertising, recruiting, and accepting applications for the 2025 training sessions. Individual applicants can have a choice of 2-3 different training dates and times. We can award (and bill for) all 30 scholarships and consulting time prior to February 28, 2025.
6. The anticipated outcome of Guidelight Group's proposal is that a diverse group of 30 independent facilitators will support clients from varied cultural, socioeconomic, and linguistic backgrounds with high quality person-centered planning, both for initially transitioning into the Self-Determination Program and then leading a self-determined life. Scholarships will be awarded to applicants who are best qualified to meet the diverse linguistic and cultural needs of underrepresented communities, especially Spanish-speaking and Vietnamese communities. All participants will participate in the standard English training program, and additional support can be provided by a Spanish-speaking independent facilitator. Upon completion of this training, a requirement of the scholarship will be that new IFs commit to serving this community and clients from the various disparity groups.

Guidelight Group will also provide Person-Centered Thinking training to all 30 scholarship recipients. This additional training will reinforce and complement the skills and practices taught in the primary course around person-centered planning. It will also give scholarship awardees additional opportunities to practice with relevant tools and develop confidence with leading person-centered planning specific to self-determination.

Guidelight Group will collaborate with the RCOC SDP team to develop an additional training session for the new IFs covering the specific processes and expectations for effective person-centered plans for SDP participants at the RCOC, which will promote effective collaboration between IFs and RCOC to support SDP participants.

Success will be measured by the cultural and linguistic diversity of the trainees, the number of trainees who complete The Essential Independent Facilitator Training Program and earn their certificate of comprehension, the number of trainees who complete Person Centered Thinking training, the number and demographic diversity of SDP participants of RCOC served by trainees within one year of completing the program, and trainee satisfaction with the program. Guidelight Group will conduct a satisfaction survey at the end of the training program, and collect outcome data twelve months after the program to determine the number and makeup of clients served.

Participants from similar grant projects have shared the following testimonials:

*“The hosts set the tone. This group made you feel comfortable asking questions. No one made you feel like it was a dumb question nor were they judgmental. People were given time to articulate their questions even when they were not clear on how to ask it. I also like the fact that I can still use the remaining coaching sessions to deal with issues that may come up after implementing what I have learned in real life situations.”*

*“My main language is Mandarin. As an immigrant, to take a course in English is not an easy thing. This is my first English training program! I finished it! Excellent teachers, great course, friendly classmates, all are wonderful! The slide shows before every session and the videos with text after every session helped me a lot! It is a great inspiration to me! I went from avoiding speaking at the beginning to asking questions! Thank you Debra and Sonni, I benefited a lot, not only the knowledge, but also the attitudes to work and persons! Really appreciate it!”*

*“I can't recommend the Guidelight Group Independent Facilitator Coaching Program highly enough. From the moment I joined, I felt supported and challenged in the best possible ways. The program offered a perfect blend of practical skills and personal development that has significantly enhanced my facilitation abilities. The facilitators themselves were not only experts in their fields but also genuinely invested in my growth. Their feedback was constructive, and their encouragement was a driving force behind my progress.*

*One of the highlights of the program was the real-world application. We had numerous opportunities to practice and refine our skills, which gave me the confidence to lead sessions with poise and professionalism. The tools and strategies I gained are invaluable, and I've already seen a noticeable improvement in my facilitation style and effectiveness.*

*What truly sets this program apart is the community. The network of peers and mentors you connect with is incredibly supportive and collaborative. The*

*exchange of ideas and experiences has been enriching and has broadened my perspective on facilitation. If you're considering this program, know that you're investing in not just a set of skills, but in a transformative experience that will empower you both personally and professionally. The Guidelight Group Independent Facilitator Coaching Program exceeded my expectations and has been a pivotal step in my journey as a facilitator. I wholeheartedly encourage anyone who is serious about enhancing their facilitation skills to take this course. It's an investment that will pay dividends for years to come."*

7. See attached one page Project Budget showing how funds will be utilized.

PROJECT BUDGET		PROJECT NAME: Guidelight Group
LINE ITEMS	PROPOSE AMOUNT TO SPEND	
Partial Scholarships at \$1,700 each for 30 individuals	\$	51,000.00
Additional funds for needs-based, full scholarships at \$280 each up to 20 individuals	\$	5,600.00
Consulting (50 hours total): Developing marketing materials, marketing outreach and recruitment, developing application, managing application process, awarding scholarships, enrolling participants, collaborating with RCOC team to develop specialized ninth session as outlined above, liaising with RCOC staff and LAC, collecting and reporting on outcome data, assisting IFs with 024/099 utilization	\$	8,750.00
Person-Centered Thinking Training for 30 individuals	\$	4,375.00
<b>TOTAL</b>	<b>\$</b>	<b>69,725.00</b>



## Request for Proposals

### From Self-Determination Local Advisory Committee for RCOC Issued on MONTH/DAY/YEAR Deadline for submission: September 15, 2024

**Background:** Self-Determination Program Local Advisory Committees (SDP LAC's) were established by law to provide oversight of the Self-Determination Program (SDP) and make recommendations for improvement to each local regional center and the Department of Developmental Services. Periodically, funds are granted by the Department of Developmental Services (DDS) to the SDP LAC's and Regional Centers to support the implementation of the SDP. The SDP LAC for Regional Center of Orange County (RCOC) has prioritized the needs in follow-up with SDP interested consumers and is seeking proposals from interested parties to carry out the below project which the committee wishes to fund.

W&I Code section 4685.8(g) specifies these funds shall be used to maximize the ability of SDP participants to direct their own lives. DDS, in consultation with stakeholders, identified priority areas for the funding including Support or coaching in making the transition to SDP;

#### **Project Proposal/Description: Resource Fair Follow-up**

Proposals are being accepted to provide an individualized follow-up to all Resource Fair registrants and/or participants (the population = approx. 100 individuals). We are of the belief that an individualized follow-up session can help the persons served to understand next steps and suggested resources to accelerate their participation (or decision not to participate) in Self Determination. While there is an abundance of materials and information available, it can be challenging for families and self-advocates to identify their best path forward, especially given all the other challenges on their plates. This project can help "fill the gap" between initial interest in SDP and being connected to an Independent Facilitator and FMS who can work with the participant to drive the process to completion.

The SDP LAC envisions the following:

1. Development of an Orange County specific "Quick Start Guide", similar to what consumers receive in a new TV box, which includes a flow diagram and links to the various resources for each step in the process.
2. Development of an Orange County specific SDP readiness assessment tool (based on quick start guide steps).
3. Identification of self-advocates or family members with more than 1 year of SDP experience in Orange County and/or Independent Facilitators with at least one client in SDP in Orange County who can do outreach calls and/or emails to the population. A small number of these outreach callers will be utilized in order to complete this initial project in a timely manner.
4. Outreach should aim for maximizing participation among BIPOC communities (Black, Indigenous, People of Color) and self-advocates (persons with developmental disabilities). English and Spanish interpretation must be available, with others to match the population highly desired. While good faith efforts will be made to contact every member of the population, it is understood that this project will serve as a pilot outreach to Orange County consumers who are interested in SDP. Outreach will consist of one or more calls and emails and completion will be achieved by completion of the assessment report for each contact. Price for this program component will be on a per outreach fee.

5. Training sessions for selected self-advocates or family members involved in outreach for items 1 and 2.
6. A program summary report showing number of outreaches, status of each individual (based on the quick start guide steps), and feedback on perceived or actual challenges in moving forward into SDP.
7. An organizer who will coordinate training for the outreach calls, preparation of the Quick Start Guide for review/approval by RCOC LAC, and who will coordinate and submit project status and appropriate invoices (SDP outreach callers will be paid a fee for each outreach).

**Total funding available: up to \$15,000**  
**Project must be completed by January 1, 2025**

### **Application Instructions**

Submit the following documentation/information by May 30, 2024:

1. Application Questionnaire
2. Responses to the project-specific questions
3. Project budget

### **GENERAL APPLICATION QUESTIONNAIRE**

1. Name of Applicant (Organization or Individual)
2. Is Applicant an Independent Contractor / Sole Proprietor, Partnership, LLC, or a corporation (indicate whether nonprofit or for profit)
3. Name of Primary Contact
4. Email of Primary Contact
5. Telephone Number of Primary Contact
6. Address
7. Website (if applicable)
8. What percentage of the ownership of this business or of the total number of members of the Board of Directors are persons with developmental disabilities or cross-disabilities? What is the demographics of the Board of Directors and/or vested owners?
9. Describe your experience:
  - a. Working with persons with intellectual or developmental disabilities including the scope of the services you have provided
  - b. Working with underserved, unserved, or BIPOC communities
  - c. With community outreach, training, and resource development
10. Describe your familiarity and experience with:



- a. Person centered planning
- b. Self-determination
- c. Use of plain language / universal design of learning (including drafting plain language materials and speaking in plain language)
- d. Community resources, the regional center system, and other agencies who have a role in supporting people with intellectual and/or developmental disabilities

11. List the project you are applying for under this RFP

12. Provide us with the name and contact information (telephone, email address) of 3 professional references

### **PROJECT SPECIFIC-QUESTIONNAIRE**

In addition to responding to the general application, please answer the supplemental questions below on a separate paper:

1. Your experience in SDP, including the name of the associated regional center(s) where you provide services
2. Ability to maintain and monitor project plans, project schedules, work hours, budgets, and expenditures.
3. Outline the timeline for completion of tasks to ensure project deadline is met by January 1, 2025.
4. Identify the anticipated outcomes of your project and how will you measure your success.
5. Attach a one-page Project Budget showing how funds will be utilized. Please include separate line items for all planned expenditure

## Solicitud de Propuestas

### del Comité Asesor Local de Autodeterminación para el RCO

Emitida el MES/DÍA/AÑO

Fecha límite para la entrega: 15 de septiembre de 2024

**Antecedentes** Se establecieron los Comités Asesores Local del Programa de Autodeterminación (los SDP LAC) por ley para supervisar el Programa de Autodeterminación (SDP) y hacer recomendaciones para mejorar cada uno de los centros regionales locales y del Departamento de Servicios del Desarrollo. El Departamento de Servicios del Desarrollo (DDS) otorga fondos periódicamente a los SDP LAC y los centros regionales para apoyar la implementación del SDP. El SDP LAC para el Centro Regional del Condado de Orange (RCOC) ha dado prioridad a las necesidades de seguimiento con los clientes interesados del SDP y está solicitando propuestas de partes interesadas en realizar el proyecto que se describe enseguida y que el comité desea financiar.

La Sección 4685.8(g) del Código W&I especifica que estos fondos se deben usar para maximizar la habilidad de los participantes del SDP para encausar su propia vida. El DDS, en colaboración con personas interesadas, identificó las áreas prioritarias para el financiamiento, incluido el apoyo y la capacitación para hacer la transición al SDP;

### **Propuesta de proyecto/Descripción Seguimiento de la Feria de Recursos**

Se están aceptando propuestas para proveer un seguimiento individualizado a todas las personas inscritas y/o participantes en la Feria de Recursos (la población equivalente a aproximadamente 100 personas). Creemos que una sesión de seguimiento individual puede ayudar a las personas que reciben servicios a entender cuáles son los siguientes pasos y recursos sugeridos para acelerar su participación (o decisión de no participar) en la Autodeterminación. Aunque hay disponibles bastantes materiales e información, identificar su mejor camino a seguir puede representar un reto para las familias y las personas que abogan por sí mismas, especialmente considerando todos los demás desafíos encima. El proyecto puede ayudar a “llenar el vacío” entre el interés inicial en el SDP y conectarse con un facilitador independiente y una agencia FMS que pueda colaborar con el participante para completar el proceso.

El SDP LAC vislumbra lo siguiente:

1. Preparar una “Guía de inicio rápido” específica del Condado de Orange y semejante a lo que la que reciben los consumidores en la caja de una televisión nueva, que incluya un diagrama de flujo y enlaces a diversos recursos para cada paso del proceso.
2. Desarrollar una herramienta de evaluación de preparación específica del Condado de Orange (basada en los pasos de la guía de inicio rápido).
3. Identifica a las personas que abogan por sí mismas o los familiares con más de 1 años de experiencia en el SDP en el Condado de Orange y/o facilitadores independientes con por lo menos un cliente en el SDP en el Condado de Orange que puedan hacer llamadas y/o mandar correos electrónicos de divulgación a la población. Se utilizará un número pequeño de estos llamadores de divulgación para completar el proyecto inicial a tiempo.
4. La divulgación debe tener como objetivo maximizar la participación entre las comunidades BIPOC (afrodescendientes, indígenas y personas de color) y las personas que abogan por sí mismas (individuos con discapacidades del desarrollo) Debe ofrecerse interpretación de inglés y español, con otras personas que correspondan a la población

altamente deseada. Aunque se harán esfuerzos de buena fe para contactar a todos los miembros de la población, se entiende que este proyecto servirá como divulgación piloto con clientes del Condado de Orange que están interesados en el SDP. El proceso de divulgación consiste en hacer una o más llamadas y mandar correos electrónicos y se logrará realizar completando el informe de la evaluación de cada contacto. El precio de este componente del programa será conforme a una cuota por contacto.

5. Las sesión de capacitación para personas que abogan por sí mismas o familiares selectos implican hacer contacto para los artículos 1 y 2.
6. Un informe resumido del programa indicando el número de contactos, la situación de cada persona (basada en los pasos de la guía de inicio rápido) y los comentarios sobre retos percibidos o reales en el avance hacia el SDP.
7. Un organizador que coordine la capacitación para las llamadas de divulgación, la preparación de la “Guía de inicio rápido” para que la revise/apruebe el Comité Asesor Local del RCOOC y que coordinará y entregará el estado del proyecto y las facturas apropiadas (se hará un pago a los llamadores de divulgación del SDP por cada contacto).

**Financiamiento total disponible: hasta \$15,000**

**Se debe completar el proyecto para el 1 de enero de 2025**

### **Instrucciones para la solicitud**

Entregar la siguiente documentación/información para el 30 de mayo de 2024:

1. Cuestionario de la solicitud
2. Respuestas a preguntas específicas del proyecto
3. Presupuesto del proyecto

### **CUESTIONARIO GENERAL DE LA SOLICITUD**

1. Nombre del solicitante (organización o individual)
2. Si el solicitante es un contratista independiente/propietario único, una asociación, una sociedad de responsabilidad limitada o una sociedad anónima (indicar si es con o sin fines de lucro)
3. Nombre del contacto principal
4. Correo electrónico del contacto principal
5. Número de teléfono del contacto principal
6. Dirección
7. Sitio web (si procede)
8. ¿Cuál es el porcentaje de la propiedad de esta empresa o del número total de miembros de la Junta Directiva que son personas con discapacidades del desarrollo o con discapacidades cruzadas? ¿Cuáles son las estadísticas demográficas de la Junta Directiva y/o los propietarios con interés personal?
9. Describa su experiencia:

- a. Trabajar con personas con discapacidades intelectuales o del desarrollo, incluido el alcance de los servicios que usted ha prestado.
- b. Trabajar con comunidades marginadas, ignoradas o de afrodescendientes, indígenas y personas de color (BIPOC).
- c. Con divulgación en la comunidad, capacitación o desarrollo de recursos.

10. Describa su familiaridad y experiencia con:

- a. Planificación centrada en persona
- b. Autodeterminación
- c. El uso de lenguaje sencillo/diseño universal de aprendizaje (incluidos preparación de materiales en lenguaje sencillo y hablar en lenguaje sencillo)
- d. Recursos comunitarios, el sistema de centros regionales y otras agencias que desempeñan un papel en apoyar a las personas con discapacidades intelectuales y/o del desarrollo.

11. Enumere el proyecto para el que está presentando una solicitud conforme a esta RFP.

12. Denos el nombre y la información de contacto (teléfono, dirección electrónica) de tres referencias profesionales.

### **CUESTIONARIO ESPECÍFICO DEL PROYECTO**

Además de responder a la solicitud general, responda a las preguntas complementarias a continuación en una hoja aparte:

1. Su experiencia en el SDP, incluido el nombre del centro o centros regionales asociados en donde usted presta servicios.
2. Su habilidad para mantener y supervisar planes de proyectos, horarios de proyectos, horarios, presupuestos y gastos.
3. Una descripción de una línea de tiempo para completar las tareas y asegurar que se cumpla con la fecha límite del proyecto para el 1 de enero de 2025.
4. La identificación de resultados previstos de su proyecto y cómo medirá usted su éxito.
5. Adjunte un “Presupuesto del proyecto” de una página que muestre cómo se utilizarán los fondos. Incluya conceptos separados para todos los gastos planeados

## Đề Nghị Mời Thầu

### Từ Ủy Ban Cố Vấn Địa Phương Cho Chương Trình Tự Quyết Định của RCO Ban hành vào THÁNG/NGÀY/NĂM Hạn cuối nộp đơn: Ngày 15 tháng 9 năm 2024

**Bối Cảnh:** Ủy Ban Cố Vấn Địa Phương Cho Chương Trình Tự Quyết Định (Self-Determination Program Local Advisory Committees, SDP LAC) được thành lập theo luật để giám sát Chương Trình Tự Quyết Định (Self-Determination Program, SDP) và đưa ra các khuyến nghị để cải thiện cho từng Trung Tâm Khu Vực địa phương và cho Sở Dịch Vụ Phát Triển. Theo định kỳ, Sở Dịch Vụ Phát Triển (Department of Developmental Services, DDS) sẽ cấp kinh phí cho SDP LAC và các Trung Tâm Khu Vực để hỗ trợ việc triển khai SDP. SDP LAC cho Trung Tâm Khu Vực Quận Cam (RCOC) đã ưu tiên các nhu cầu trong quá trình theo dõi với những người tiêu dùng quan tâm đến SDP, và đang tìm kiếm các đề xuất từ những bên quan tâm để thực hiện dự án mà ủy ban muốn tài trợ dưới đây.

Mục 4685.8(g) của Bộ Luật Phúc Lợi và Thẻ Ché (W&I) quy định các khoản tiền này sẽ được sử dụng để tối đa hóa khả năng tự định hướng trong cuộc sống cho những người tham gia SDP. DDS, sau khi tham vấn với các bên liên quan, đã xác định các lĩnh vực ưu tiên cần tiền tài trợ bao gồm Hỗ Trợ hoặc tư vấn về cách thực hiện quá trình chuyển đổi sang SDP;

### **Đề Xuất/Mô Tả Dự Án: Theo Dõi Hội Chợ Nguồn Lực**

Các đề xuất đang được tiếp nhận để cung cấp dịch vụ theo dõi cá nhân cho tất cả người đăng ký và/hoặc người tham gia Hội Chợ Nguồn Lực (số lượng người = khoảng 100 cá nhân). Chúng tôi tin rằng một buổi theo dõi theo từng cá nhân có thể giúp những người được phục vụ hiểu các bước tiếp theo cũng như các nguồn lực được đề xuất để đẩy nhanh sự tham gia (hoặc quyết định không tham gia) của họ vào chương trình Quyền Trình Tự Quyết Định. Mặc dù tài liệu và thông tin sẵn có rất dồi dào, nhưng các gia đình và người chủ động tham gia có thể gặp khó khăn trong việc xác định đâu là con đường tốt nhất để tiến về phía trước, đặc biệt là khi họ còn đang phải đối mặt với nhiều thách thức khác. Dự án này có thể giúp “bắc cầu” đưa họ từ bước quan tâm ban đầu đến SDP tới bước được kết nối với Người Hướng Dẫn Độc Lập và Dịch Vụ Quản Lý Tài Chính (FMS), những người có thể làm việc với người tham gia để thúc đẩy quá trình hoàn tất.

SDP LAC có tầm nhìn như sau:

1. Phát triển “Hướng Dẫn Bắt Đầu Nhanh” dành riêng cho Quận Cam, giống như hướng dẫn sử dụng trong hộp đựng ti vi mới, trong đó bao gồm sơ đồ quy trình và các đường liên kết đến những tài nguyên khác nhau cho từng bước trong quy trình.
2. Phát triển công cụ đánh giá mức độ sẵn sàng của SDP dành riêng cho Quận Cam (dựa trên các bước trong hướng dẫn bắt đầu nhanh).
3. Xác định những người chủ động tham gia hoặc thành viên gia đình có hơn 1 năm kinh nghiệm trong SDP tại Quận Cam và/hoặc những Người Hướng Dẫn Độc Lập có ít nhất một khách hàng trong SDP tại Quận Cam và có thể thực hiện các cuộc gọi và/hoặc gửi email tiếp cận cho người dân. Một số ít người gọi điện tiếp cận này sẽ được sử dụng để hoàn thành dự án ban đầu này một cách kịp thời.
4. Hoạt động tiếp cận nên hướng tới mục tiêu tối đa hóa sự tham gia từ phía cộng đồng BIPOC (người da đen, da màu và thổ dân bản xứ) và những người chủ động muốn tham gia (người mắc khuyết tật phát triển). Phải có dịch vụ thông dịch tiếng Anh và tiếng Tây Ban Nha, ngoài ra cần có những ngôn ngữ khác phù hợp với nhu cầu của nhóm dân số có nhu cầu dịch vụ cao. Mặc dù chúng tôi sẽ nỗ lực hết sức để liên lạc với mọi thành viên trong mọi cộng đồng, xin hiểu rằng dự án này sẽ đóng vai trò là chương trình tiếp cận thí

điểm hướng tới những người tiêu dùng quan tâm đến SDP ở Quận Cam. Hoạt động tiếp cận sẽ bao gồm gọi điện và gửi email một hoặc nhiều lần, và để được tính là hoàn thành hoạt động này, cần hoàn thành báo cáo đánh giá đối với mỗi lượt liên hệ. Giá cả của cấu phần này trong chương trình sẽ được tính theo phí của từng lượt tiếp cận.

5. Các buổi đào tạo dành cho những người chủ động tham gia hoặc thành viên gia đình được lựa chọn tham gia vào hoạt động tiếp cận ở mục 1 và 2.
6. Báo cáo tóm tắt chương trình cho thấy số lượt tiếp cận, tình trạng của từng cá nhân (dựa trên các bước trong hướng dẫn bắt đầu nhanh) và phản hồi về những thách thức có thể nhận thức hoặc trên thực tế trong quá trình tiến tới SDP.
7. Người tổ chức sẽ điều phối hoạt động đào tạo thực hiện các cuộc gọi tiếp cận, chuẩn bị Hướng Dẫn Bắt Đầu Nhanh để RCOC LAC xem xét/phê duyệt, và là người sẽ điều phối và gửi báo cáo tình trạng dự án cùng các hóa đơn phù hợp (người gọi tiếp cận SDP sẽ được trả một khoản phí cho mỗi lượt tiếp cận).

**Tổng kinh phí có sẵn: tối đa \$15,000**

**Phải hoàn thành chương trình cần chậm nhất vào ngày 1 tháng 1 năm 2025**

### **Hướng Dẫn Đăng Ký:**

Nộp các giấy tờ/thông tin sau chậm nhất vào ngày 30 tháng 5 năm 2004:

1. Bảng Câu Hỏi Đăng Ký
2. Trả lời các câu hỏi cụ thể của dự án.
3. Kinh phí của dự án

### **BẢNG CÂU HỎI ĐĂNG KÝ CHUNG**

1. Tên Người Nộp Đơn (Tổ Chức hoặc Cá Nhân)
2. Người nộp đơn có phải là Nhà Thầu Độc Lập/Chủ Sở Hữu Duy Nhất, Đối Tác, LLC hay một công ty (ghi rõ là phi lợi nhuận hay có lợi nhuận)
3. Tên Người Liên Hệ Chính
4. Email của Người Liên Hệ Chính
5. Số Điện Thoại của Người Liên Hệ Chính
6. Địa Chỉ
7. Trang Web (nếu có)
8. Tỷ lệ phần trăm sở hữu doanh nghiệp này, hoặc tổng số thành viên của Hội Đồng Quản Trị là người khuyết tật phát triển hay bất cứ dạng khuyết tật nào? Cơ cấu nhân khẩu học của Hội Đồng Quản Trị và/hoặc chủ sở hữu cổ phần như thế nào?
9. Mô tả kinh nghiệm của quý vị liên quan tới:
  - a. Làm việc với những người khuyết tật về trí tuệ hoặc phát triển, bao gồm phạm vi các dịch vụ mà quý vị đã cung cấp
  - b. Làm việc với các cộng đồng thiểu thốn dịch vụ y tế, không được tiếp cận dịch vụ y tế hoặc cộng đồng BIPOC (người da đen, da màu và thổ dân bản địa)
  - c. Với các hoạt động tiếp cận cộng đồng, đào tạo và phát triển nguồn lực

10. Mô tả mức độ quen thuộc và kinh nghiệm của quý vị với:

- a. Lập kế hoạch tập trung vào con người
- b. Tự Quyết Định
- c. Việc sử dụng ngôn ngữ đơn giản / thiết kế chương trình học tập phổ quát (bao gồm soạn thảo tài liệu bằng ngôn ngữ đơn giản và nói chuyện bằng ngôn ngữ đơn giản)
- d. Các nguồn lực cộng đồng, hệ thống Trung Tâm Khu Vực và các cơ quan khác có vai trò hỗ trợ những người khuyết tật về trí tuệ và/hoặc phát triển

11. Liệt kê dự án quý vị đang nộp đơn bằng Đề Nghị Mời Thầu (RFP) này

12. Cung cấp cho chúng tôi tên và thông tin liên lạc (điện thoại, địa chỉ email) của 3 người giới thiệu có chuyên môn của quý vị

### **BẢNG CÂU HỎI CU THỂ VỀ DỰ ÁN**

Ngoài việc trả lời đơn đăng ký chung, vui lòng trả lời các câu hỏi bổ sung bên dưới trên một tờ giấy riêng:

1. Kinh nghiệm của quý vị trong lĩnh vực SDP, bao gồm tên của (các) Trung Tâm Khu Vực liên quan nơi quý vị cung cấp dịch vụ
2. Khả năng duy trì và giám sát kế hoạch dự án, lịch trình dự án, giờ làm việc, ngân sách và các khoản chi tiêu.
3. Vạch ra mốc thời gian hoàn thành các nhiệm vụ để đảm bảo dự án đáp ứng được thời hạn hoàn thành vào ngày 1 tháng 1 năm 2025.
4. Xác định kết quả mong đợi của dự án và cách quý vị đo lường mức độ thành công của mình.
5. Đính kèm bản Ngân Sách Dự Án dài một trang nêu rõ cách sử dụng khoản quỹ. Vui lòng ghi ra từng mục riêng biệt cho tất cả các khoản chi đã lên kế hoạch

Karate For All  
3002 Dow Ave #114  
Tustin, CA 92780



Email : karateforall@cox.net  
Phone: 714 731 4668  
Fax: 714 464 4668

## Resource Fair Follow Up Proposal

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1. Name of the applicant: **KARATE FOR ALL**
2. Is application an Independent Contractor/Sole Proprietor, Partnership, LLC, or a corporation:  
  
**We are LLC with tax classification: S Corporation**
3. Name of the Primary Contact: **Brittney Centra**
4. Email of Primary Contact: **karateforall@cox.net**
5. Telephone Number of Primary Contact: **714-757-8040**
6. Address: **3002 Dow Ave #114, Tustin, CA 92780**
7. Website: **<https://www.karateforall.org/>**
8. What percentage of the ownership of this business or of the total number of members of the Board of Director are person with developmental disability or cross-disabilities? What are the demographics of the Board of Directors and / or vested owners? Wayne Centra, the owner of the company, holds 100% of the ownership. We do not have a Board of Directors. Wayne Centra is an Occupational Therapist, and founder of the program: Karate For All.
9. Describe your experience
  - Working with persons with intellectual or developmental disabilities including the scope of the service you have provided
  - Working with underserved, unserved, BIPOC community
  - With community outreach, training and resources development

**Wayne Centra began working in acute mental health and community-based programs in 1993. He earned his master's degree in occupational therapy in 2000 and dedicated**



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many years to working as an occupational therapist at College Hospital, RCOO pediatric in-home therapy, RIO Rehab Institute of Orange, CHOC Children's Hospital for several years. In 2001, his professional journey culminated in the creation of the program **KARATE FOR ALL**, a groundbreaking initiative that integrates his expertise in occupational therapy with his extensive knowledge of martial arts. He combined his background in martial arts with his professional discipline of Occupational Therapy. As a trailblazer in the field of self-determination, Wayne Centra has garnered multiple recognitions from various news outlets, as well as the Innovation award from CHOC Hospital. As the visionary behind the program, Wayne Centra has been instrumental in teaching and empowering children and adults with disabilities across Orange County through Karate For All.

**He teaches students the following:**

- **Self-defense in the community**
- **Anti Bullying Strategies**
- **Social and emotional skills in a community-based setting. This will enhance their social skills and foster greater independence.**

Over the last 23 years since the inception of our program, many of our students have successfully graduated with their degrees. Currently, those students are pursuing higher education at various esteemed institutions such as UCLA, USC, Cal State Dominguez Hills, while also securing meaningful employment within the community. Our program has provided them with a nurturing environment that not only empowers their personal growth, but also offers unwavering belief in their potential, ensuring continued support as they build their future.

10. Describe your familiarity and experience with:

- Person center planning
- Self determination
- Use of plain language/ universal design of learning
- Community resources, the regional center system and other agencies who have a role in supporting people with intellectual and or developmental disability

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**Our program is designed to be both flexible and responsive to each student’s unique medical diagnosis and individual needs. We offer a diverse range of lessons options tailored to meet the needs of each student. Emphasizing an in-home and community-based approach, our martial art program aims to promote independence and safety for both children and adults within their community. To facilitate the student’s learning, we utilize:**

- **Visual Boards and Diagrams**
- **Online video and tutoring**
- **Additional supportive staff**
- **Parent training and classes**
- **Adaptive activities designed to enhance functional skills levels**

**11. List the project you are applying for under RFP**

- Your experience in SDP, including the name of the associated Regional Centers where you provide services
- Ability to maintain and monitor project plans, project schedules, work hours, budgets, and expenditures
- Outline the timeline for completion of tasks to ensure project deadlines is met by Jan 1<sup>st</sup> 2025
- Identify the anticipated outcome of your project and how you will measure your success.
- Attached is a one-page project Budget showing how funds will be utilized. Please include separate lien items for all planned expenditures.

**During the RCOC resource fair at Santa Zoo a few months ago, we received expressions of interest from 26 families regarding our program. However, some of these families raised concerns about the affordability of the program.**

**Since receiving information about the Self Determination Project from the resource fair’s “Resource Fair Follow up” notice, we believe that securing funding to bridge the gap**

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between initial interest in SDP and connection with the Independent Facilitator and FMS will be highly beneficial for the families in needs.

We currently have 42 students that receive funding from Mains'l, GT independence, Maxim, Sequoia, Ritz FMS, Action FMS, and Aveanna.

Here is our proposal for accommodating 20 new students despite having a current list of 26 students (please see the attachment). Our plan is:

- Each new RCOC student participates in either one-on-one lessons or in group sessions, depending on their cognitive function, for a duration of 2 months to assess whether our program is the appropriate fit.
- **Our registration fee is \$40.00**, which includes a T-shirt and Karate For All patch. Parents purchase the uniforms (karate Gi) online independently. **Should RCOC prefer to provide the funding, the cost is \$30.00.**
- Each lesson is 30 minutes, one time per week. Each month (4 lessons) will be \$213.00 or \$53.25 per lesson. **Two months tuition (8 lessons) will be \$416.00**
- The total cost for each student for a 2-month period (or 8 lessons) will be \$40.00 + \$30.00 + \$416.00= \$486.00
- **The total cost for 20 students for 2 months (8 lessons) is \$486.00 x 20 students = \$9720.00**
- *If a student is unable to complete the two-month period (8 lessons), any remaining tuition may be allocated to support other RCOC students who wish to continue the program beyond the initial 2 months.*
- *If a student wishes to continue the program after the initial 2 months, we hope the funding source will be available to cover for their tuition at that time.*
- *If funding is not fully utilized by the deadline of 1.1.2025, RCOC can request a refund of the remaining amount.*
- Below is a sample record-keeping template for tracking individuals who qualify for this program.

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<b>Start date</b>	<b>Name of student</b>	<b>Date of 1<sup>st</sup> month participating</b>	<b>Date of 2<sup>nd</sup> month participating</b>	<b>Total tuition after 2month</b>	<b>Reason to stop or reason to continue</b>

- **The family will be requested to complete a satisfaction survey. Here is a sample:**

Name of student	
Name of Parents	
Date to start the Karate program	
Date to stop the Karate program	
Reason to stop karate Program	
Reason to continue the Karate Program after 2 months	
Date to complete the form	
Any feedback for KFA	

- **During the 2-month period, students will learn the following:**
  - **Basic self defense**
  - **Blocking, Kicking, Punching, Evading, Attacking**
  - **Anti Bullying strategies**
  - **Social Skills and forming friendships and connections with others**
  - **Emotional Regulation Skills**
  - **Identify their emotion and regulate their emotions effectively**

12. Provide us with the name and contact details of 3 professional references.

❖ **██████████ Pediatric Physical Therapist.**

Phone: ██████████

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Phone: 714 731 4668  
Fax: 714 464 4668

Email: [REDACTED]

❖ [REDACTED] **Pediatric Occupational Therapist**

Phone: [REDACTED]

Email: in [REDACTED]

❖ [REDACTED] **Speech Therapist**

Phone: [REDACTED]

[REDACTED]@gmail.com

We are grateful for your considering our proposal. Thank you very much for your time.

Warm regards,

Brittney Centra

Manager of Karate For All

Address: 3002 Dow Ave, #114, Tustin, CA 92780

Phone: 714-731-4668 (office) or 714-757-8040 (direct)

Website: <https://www.karateforall.org/>



## **SDP Resource Fair Follow-Up**

### **Project Proposal**

Greenfield and Associates proposes to provide the following services as a follow-up to the Self Determination Resource Fair for Regional Center participants and their families for the purpose of “filling the gap” between initial interest in SDP, and being connected to professional Independent Facilitators/Financial Management Service(s) that can facilitate their enrollment in the Self Determination Program:

- The development of a Quick Start Guide for persons served who are considering enrollment in the Self Determination Program, including:
  - A Flow Diagram in plain language that simplifies the steps required to enroll in the Self Determination Program.
  - The Flow Diagram will be able to be published in .PDF, and .JPEG and embedded in websites to be used in print as well as web-based production, including posting on the RCOC website.
  - The Flow Diagram will contain printed links, and live click-through for websites, to the resources for each step of the process
  - The Flow Diagram will be published in English, Spanish, and Vietnamese.
  - The Flow Diagram will be developed via collaboration with persons served as well as people who identify as BIPOC.
- The Development of a Self Determination Program Readiness Assessment Tool:
  - The Assessment Tool will be made available to the Regional Center of Orange County, in formats that can be printed, and posted on website(s).
  - The Assessment Tool will be published in English, Spanish, and Vietnamese.
  - The Assessment Tool will be linked in the Flow Diagram
- Creation of a small Team of People for the purpose of providing follow-up outreach calls, emails, and/or meetings to assist Resource Fair attendees with answering questions and getting their needs met with regard to entering the Self Determination Program:
  - The team may include self-advocates, family members of persons served, experienced Orange County based Independent Facilitators, and/or people who identify as BIPOC.
  - The team may include persons whose first language is English, Spanish, Vietnamese, and/or Mandarin. Additional languages may be used, based on Interpreter availability.
  - Training will be provided for all persons involved in outreach/follow-up activities.
- Outreach to attendees of the SDP Resource Fair conducted by the outreach team, and/or the project Manager. Outreach will include multiple attempts, including email, phone calls, and/or meetings (Zoom or in-person)



6. Address

[REDACTED]

7. Website (if applicable)

<https://www.greenfieldandassociates.com>

8. What percentage of the ownership of this business or of the total number of members of the Board of Directors are persons with developmental disabilities or cross-disabilities? What is the demographics of the Board of Directors and/or vested owners?

I (Bill Greenfield) am the sole owner of Greenfield and Associates LLC. I do not have a developmental disability, and am Caucasian. However, I will be employing persons served, their families/friends, and/or persons who identify as BIPOC as (1099) general contractors for this project.

9. Describe your experience:

a. Working with persons with intellectual or developmental disabilities including the scope of the services you have provided

I (Bill Greenfield) have worked with persons with intellectual and developmental disabilities as a Special Education teacher/administrator in public, non-public, and private school settings for more than 24 years. The services I have provided include Specialized Academic Instruction, Mentoring, Job Coaching, Travel Training, Work Experience Training, and Recreation/Leisure Services. I have also coached multiple seasons of Miracle League Baseball and Challenger Football.

I am an Independent Facilitator. I provide Person-Centered planning, pre-enrollment services, and ongoing support for persons served as they transition into the Self Determination Program. Finally, for the past 5 years, I been a consultant to the Greater Los Angeles Area Council, Scouts BSA to assist with increasing equity and inclusion of persons with disabilities in Scouting activities. My direct goals are to increase access for persons with disabilities to Pack, Troop, Camp, Outdoor Adventure activities, and rank advancement opportunities. I am also on the teaching staff of the Scouts BSA National Camp Accreditation School, where I instruct on subjects such as, increasing inclusion for persons with disabilities, and compliance with the Americans with Disabilities Act.



b. Working with underserved, unserved, or BIPOC communities

The vast majority of the persons with disabilities with which I have worked over the past 24 years, have been underserved/unserved, and/or People of Color. Additionally, the majority of the persons with disabilities that I have (and currently) serve, are identified as socioeconomically disadvantaged. My experience has helped me develop a sensitivity for the unique needs and circumstances of the persons with disabilities who are also underserved.

c. With community outreach, training, and resource development

Most of the persons with disabilities that I have served during my career have been under or unserved, and often socioeconomically disadvantaged. It has been important that I develop community resources and engage in community outreach to the families of my students. For example, in my current position as an Adult Transition Specialist, I facilitate ongoing food and clothing drives to meet the resource needs of my students and their families. I also develop work experience sites, employment opportunities, and community based charitable work opportunities (i.e. Blessing Boxes, Homeless Intervention Services (HIS) – OC; the Family Support Network; Path Homeless Services; PYLUSD Family Resource Center, etc.) for the students that I serve, as well as their families.

10. Describe your familiarity and experience with:

a. Person-Centered Planning

My first training in Person-Centered Planning occurred in 2009. I have been using person-centered thinking and planning for 15+ years and currently train others in Person-Centered planning.

b. Self-determination

I am an experienced professional Independent Facilitator with training in self-determination

c. Use of plain language / universal design of learning (including drafting plain language materials and speaking in plain language)

Over the course of my 24+ years as a Special Educator, I have used plain language with students with disabilities, and their families, as an instructional support for scaffolding comprehension to the subject matter being taught. My initial training on Universal Design for Learning (UDL) was in approximately 2005. Over the course of multiple years, I have integrated UDL strategies in school, work experience, and employment settings in order to “level the playing field” for work tasks, and information comprehension to assist my students with disabilities. I also draft

messages/assignments, and speak in plain language with my students with disabilities, and their families.

d. Community resources, the regional center system, and other agencies who have a role in supporting people with intellectual and/or developmental disabilities

I have been facilitating access for my students with disabilities, and their families to community resources for over 15 years. Some of the community resources to which I provide linkage to families on my caseload include SSI, Medical/Cal Optima, CalFresh, food banks, low-no cost clothing sources, low/no cost immigration attorneys, and homeless/housing resources.

I have worked with the regional center system, including Service Coordinators and Supervisors in IEP meetings, as well as with facilitating my unserved students applying for services for 15+ years. I have been working with the Regional Center as an Independent Facilitator for almost a year now.

I have a 10+ year working relationship with the State Council on Developmental Disabilities. Specifically, I have partnered with them to provide resource and training sessions for the families of students with disabilities in my school district. I have also facilitated linkages for families to the SCDD for the purpose of providing advocacy to my students with disabilities that have been denied services/public benefits to which they were entitled.

11. List the project you are applying for under this RFP

Self-Determination Local Advisory Committee – SDP Resource Fair Follow-Up

12. Provide us with the name and contact information (telephone, email address) of 3 professional references.

[Redacted]

[Redacted] [Redacted]

[Redacted]

[Redacted]

[Redacted] [Redacted]



### **PROJECT SPECIFIC-QUESTIONNAIRE**

1. Your experience in SDP, including the name of the associated regional center(s) where you provide services.

I (Bill Greenfield) have been an Independent Facilitator since April 2023, and provide services to clients who are with the Regional Center of Orange County, and the North Los Angeles County Regional Center. I am a vendor for service code 099 with the Regional Center of Orange County. My Independent Facilitator and SDP training includes the State Council on Developmental Disabilities Independent Facilitator Training Program, and the North Los Angeles County Regional Center Independent Facilitator Training and Mentoring program with Claudia Wenger – Claudia Cares Consulting. I am currently providing Independent Facilitation to clients that are in the process of entering self-determination, as well as ongoing support to clients that have successfully transitioned into SDP.

2. Ability to maintain and monitor project plans, project schedules, work hours, budgets, and expenditures.

I have been managing projects, events, schedules and budgets for many years. In my practice as a professional educator, I manage complex schedules and budgets on a daily basis.

In my work as a consultant for Scouts BSA, in addition to assisting with inclusion for persons with disabilities, I plan as well as manage large events (1000+ Scouts, and 25+ volunteer staff) multiple times per year, with a typical budget of \$55,000+ per event. As I am also responsible for maintaining profitability of the events that I manage, I have extensive experience with generating profit & loss statements, managing costs, and realistic budget forecasting.

3. Outline the timeline for completion of tasks to ensure project deadline is met by January 1<sup>st</sup>, 2025.

- Development of a Quick Start Guide for SDP to be completed by within 120 days of start of contract.

- Development of a SDP Readiness Assessment Tool to be completed within 120 days of start of contract.
- Recruitment and Training of SDP Resource Fair Follow-up facilitators to be completed within 45 days of start of contract.
- Outreach to Attendees of the Resource Fair to be completed within 180 days of start of contract
- The SDP Resource Fair Follow-up Program Summary Report to be submitted to the Regional Center of Orange County on or before January 1<sup>st</sup>, 2025.

4. Identify the anticipated outcomes of your project and how will you measure your success.

- The anticipated overall outcome of the project is that as many attendees as possible (I would provide exact figures, but I do not yet have that data) will have the information that they need in order to make a decision as to whether or not they will choose to enter the Self Determination Program.
- Those that do choose to enter the Self Determination Program, will have a clearer path forward, based on the use of the Quick Start Guide and the Assessment tool, facilitated by Team member and/or an experienced Independent Facilitator.
- The Regional Center of Orange County will have a SDP Quick Start Guide and Assessment Tool to provide to Service Coordinators, Persons-Served, and/or their representatives, which will simplify the process of ascertaining whether or not a person is ready to enter the Self Determination Program.

## **SDP Resource Fair Follow-up**

### **Project Budget**

- 1) The development of a Quick Start Guide which includes a Flow Diagram in plain language that simplifies the steps required to enroll in the Self Determination Program:  
1 Quick /start Guide= \$2000
- 2) The Quick Start Guide with Flow Diagram converted to Spanish, and Vietnamese: 3 hours each language:  
(6 total) at \$100/hr. = \$600
- 3) The Development of a Self Determination Program Readiness Assessment Tool:  
1 Self Determination Readiness Assessment Tool = \$1000
- 4) The Assessment Tool converted to Spanish, and Vietnamese: 3 hours each language:  
(6 total) at \$100/hr. = \$600
- 5) Recruitment of a small Team of People for the purpose of providing follow-up outreach calls, emails, and/or meetings to assist Resource Fair:  
4 hours at \$100/hr. = \$400
- 6) Training provided for all persons involved in outreach/follow-up activities. 4 hour small group training at \$30/hr. paid to each team member:  
\$120 per person, at 5 persons = \$600
- 7) Outreach/Follow-up to attendees of the SDP Resource Fair, which includes up to 5 attempts via email, phone calls, and/or meetings: \$10 per attendee not reached, and \$40 per attendee reached, paid at Piece-Rate to Team members:  
Per 100 attendees = \$4000
- 8) A SDP Resource Fair Follow-up Program Summary Report that documents the number of outreaches, and status/feedback for each individual that is contacted:  
6 hours at \$100/hr. = \$600
- 9) A Project Manager to oversee the entire SDP Resource Fair Follow-up Program:  
45 hours at \$100/hr. = \$4500

Total Project Cost: \$14,300