



Self-Determination Program Orientation
Train the Trainer Guidebook
March 26, 2019

Congratulations! If you are reading this guide you are preparing to do something very important...begin a partnership of learning together with potential The Self-Determination Program Program (SDP) participants. Together, you discuss and think about all the basic facets of Self-Determination and launch into a new program together!

Introduction and Purpose

This guide is intended to support the Self-Determination Program Orientation PowerPoint Curriculum Notes and Handouts supplied to attendees at the February and March, 2019 Train the Trainer Sessions provided by the Department of Developmental Services to Regional Centers and their Local Advisory Committees. Your role as an Orientation trainer is to equip new participants with a basic understanding of how the Self-Determination Program will work for them. With more detail than the Information Session, the Orientation is intended to transition the participant into the program in a positive and supportive manner. Regional Center responsibilities include but are not limited to insuring every participant receives an orientation. Per the Lanterman Act (WIC 4685.5 {d} [3] {A}) as well as the conditions of the approved 1915(c) ({B-3}{ff}) Home and Community-Based Services Waiver, the participant shall receive an orientation to the Self-Determination Program prior to enrollment.

Because SDP is just getting started statewide, we do not know everything yet. The Orientation Curriculum will likely go through some edits as we learn what works and what doesn't work about it from the people participating in the program as well as from those who support them and are implementing the program.

This Curriculum can be customized to your community. Handouts can also be customized. Your community may decide to hold the Orientation all in one day or split it into sessions. You may find that providing the Orientation in small groups works best. You may add activities or new handouts that your community would find of value. Your creativity and adaptability with this material is welcome. All we ask is that you share your ideas with us by contacting Liz Harrell at liz.harrell@sdr.org so that all the creative approaches can be shared amongst all the trainers and their communities. Together, we will keep learning and refining this Curriculum.

Required Content

It is required per the Lanterman Act is that the Orientation includes: the principles of the Self-Determination Program, the role of the independent facilitator and the financial management services provider, person centered planning, and development of a budget. Additionally, per the approved 1915(c) Home and Community-Based Services Waiver, the orientation will include information for participants on how to recognize and report instances of abuse, neglect, or exploitation. This content must be included in any edited or customized version of the Orientation.

The Packet

At times handouts from the Handout Packet will be referenced. The cover page of the Handout Packet is titled: "The Self-Determination Program Orientation Train the Trainer." This document defines the Training Objective and Outcomes for the Train the Trainer Sessions as well as lists all the handouts provided, provides contact information for questions, and provides a list of additional resources.

The PowerPoint

This guide will not go through the PowerPoint slide by slide, but will rather provide enhanced training tips and guidance for each section of the Orientation and will specifically reference slides as appropriate. All tips and guidance should be considered suggestions and are not set rules by which the training must be conducted.

While this guide will address each section in a numerical sequence, you may find you re-order or blend sections as needed in response to your community's unique training needs. Please note that anywhere you see an asterisk * on a PowerPoint slide, there is a related handout named in the notes. Lastly, some of the "training tips" in the PowerPoint notes are repeated in this guide.

- Cover Slide, Agenda, Tools

- These slides set the tone of your training.
- Who is doing the training? Is this a partnership with Regional Center Staff and Self Advocates and/or Family Members? If so, include that fact in your introductions. The Self-Determination Program is a partnership and works best when we work together. As you roll out the program, you may find that participants are best suited to support this training. Peer to peer training lands well and is in the spirit of The Self-Determination Program. Have everyone introduce themselves and why The Self-Determination Program is important to them.
- Be sure to establish the "learning together" partnership right away by thanking the participants for taking the risk of being pioneers as the State rolls out this new program. Acknowledge that these initial years may be, likely will be, bumpy as we learn how to implement the Self-Determination Program statewide. Thank them also for taking the time to come to this very intensive and long orientation, most of them likely had to miss work, a family obligation, and/or make childcare arrangements. Making these acknowledgements and establishing this partnership approach will serve you well as you proceed with this session.



- **"Tools For Training" (Slide 5)**

- Remember to remind your attendees that questions are welcomed and that, because this is a new program, you might not have all the answers. This time of "soft roll out" is a time for us to learn. It is a good idea to designate a person to take down "burning questions" for follow up. Be sure to have email addresses, set a time line for responses to burning questions, and get back to folks on their questions.
- Jason and Sofia were created to help bring the learning about SDP processes to life. Consider as you introduce the Jason and Sofia examples that as you roll out SDP you may find that you have real life participants who can participate and share their stories. You can certainly have real life examples replace these examples if you like.
- Do plan on having a simple evaluation of the orientation. Introduce the importance of completing the evaluation as a tool for learning and improvement.

- Section One: What is Self-Determination

- You may want to kick off this section with a game like “Jeopardy.” Say the definition of one of the principles of The Self-Determination Program then have attendees provide the answer in question format. Repeat a couple of times just for fun. Have candy or small prizes.



- **“Self-Determination Overview” (Slide 8)**
 - Ask attendees to explain what The Self-Determination Program is. Match what they say to the slide.



- **“Self-Determination Program Overview” (Slide 9)**
 - This slide is the first opportunity to introduce the importance of the Person Centered Plan. You are also introducing the individual budget, Independent Facilitator, and Fiscal Management Service (FMS.) Questions are likely to start right here. You can assure attendees you will be going more in depth in this session later on regarding these areas.



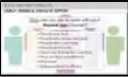


- **“History of Self-Determination” (Slide 10)**
 - Take your time with this slide. Use this as an opportunity to focus on partnership, that Regional Centers and the people they serve find success when they work together. The system was designed that way. The Self-Determination Program just builds on that premise.
 - Investing in educating everyone on the history and efforts behind this work creates personal interest and commitment. It supports responsible participation and responsible implementation.



- **“5 Principles of Self-Determination” (Slide 12)**
 - This is a great slide to have self advocate or parent trainers review with attendees and bring to life.
 - Ask attendees if they can think of examples of a principle in action.
 - Point out that the Local Advisory Committee is a great example of the principle of confirmation in action and invite participants to attend a meeting.



- **“Person Centered Planning” (Slide 13)**
 - If you have anyone who has had a person centered plan attending, ask if they would like to share how it went. Usually people are satisfied with the experience and want to share.
 - *Always be prepared, if that person’s planning session didn’t go well-how will you redirect that person’s experience to the purpose of this slide which is to introduce the importance of strong and meaningful Person Centered Planning?*

- Assure the attendees that in later slides and through the Jason and Sofia examples, we will go more in detail
 - Lead the “Important To/Important For” activity as group. You and your attendees may be surprised at how Self Advocates understand “Important To” versus how parents do! If you have time after that, have people partner up and share one “Important To” and one “Important For” example for themselves.
- Section Two: Roles and Responsibilities
 - In this section, you want to focus on the fact that there is a lot of support available. It starts off with a slide about the responsibilities of the participant. Remind participants that they are taking on more responsibility but there is support and that’s what we will go into as we go through this section.
 -  “Family, Friends, & Circle of Support” (Slide 18)
 - Help participants to think in terms of who they want to be involved in their planning, not just who is supposed to be involved. This is a reframing for folks as we have tended to think only about paid staff and professionals as support.
 - Having a self advocate or parent present this slide and present a real life example may resonate with attendees
 - Have people pair up and share who they would invite to be in their circle of support or who they have invited to be in their circle of support.
 -  “Regional Center Service Coordinator” (Slide 19)
 - Remind participants the Regional Center is here to support them.
 - Regarding the third bullet, it is important to remind attendees that there are rules about how the money can be spent that are set by the federal government. This is different that in traditional services though, where Regional Centers have POS standards or policies and services are requested and approved. Instead, in SDP, services and supports are identified through the planning process then the Regional Center will help determine what billable service definition and category each service and support matches. The Regional Center has to make sure that each service and support is a billable service-that’s what bullet three really means.
 -  “Independent Facilitator” (Slide 20)
 - Do reference the handout Hiring Service Providers or your version of this document. This is a support to help participants think about what they expect the Independent Facilitator to do, what type of person they want as the Independent Facilitator, and even how much they want to pay the person.
 - At this time, questions usually arise regarding rate of pay, training, and lists of Independent Facilitators:
 - Regarding “rates:” there are no rates for Independent Facilitators. Participants can think about what they expect the Independent

Facilitator to do and what qualifications the person has. The participant can consult with their circle of support and the Service Coordinator regarding ideas on what to pay but there is not a set rate.

- Regarding training and lists: This is a teachable moment about how the The Self-Determination Program Program is different. Each Regional Center may or may not provide Independent Facilitator training. That will be up to each Regional Center and its local advisory committee. Keep in mind, if Regional Centers do the training, certify the Independent Facilitators, and become the source of a list, it is an awful lot like vendoring all over again (or a Regional Center 2.0). Participants have the freedom to hire just about anyone they like to be their Independent Facilitator. They may want to hire a neighbor. What is important is that the neighbor have a place to get trained as an Independent Facilitator. Regional Centers take the role of helping people think about what type of Independent Facilitator they want, not just provide an existing list.



○ **"Financial Management Service" (Slide 23)**

- The FMS subject tends to raise the most questions. Reassure the attendees that you will go more in depth on this later in the session including information on selecting an FMS provider.



○ **"Choosing the Right Person for the Right Role" (Slide 25)**

- Review the handout by walking through it together. Help participants understand the need for an agreement in writing that clearly explains all the terms of service. Reinforce this takes time and, as we will cover in a planning activity later, research. The Self-Determination Program is more responsibility but with support, it can be done. It has been done, for years in California and all over the country. Support comes from the circle of support, family, the Service Coordinator, help participants think about who they will be asking for support as they plan and set up services. Setting up strong agreements based on strong plans helps supports and services run smoothly.



○ **"Jason & Sofia Examples" (Slide 26)**

- This is your first introduction of Jason and Sofia. Take some time to point out their strengths and the vision they have for their lives. Explain that through these examples we will be able to see how the Self-Determination Program works and how it differs from traditional services.

This may be a good place for a break if you are doing an all day session

- **Section Three: Planning**

- In this section, our focus is the importance of planning. Sometimes we start with a list of services or ideas of goals or we just want to know what the budget amount is but by

starting with a strong, meaningful plan, everything else will follow and make sense. Having a parent or self advocate deliver this message “lands well” and lends credibility to the processes you are about to review.



- **”Person Centered Planning and Self-Determination” (Slide 30)**
 - This is a very important slide and it suggested that both a professional and parent/self advocate share its review with the attendees. Person Centered Planning is the cornerstone of the Self-Determination Program. “Begin with the vision of the life you want for yourself or your child, don’t worry about funding yet. Just think about the vision you have and then outline the services and supports you need to get there. Figuring out how it will be funded will come next. First allow yourself the Freedom to develop a rich plan.”



- **”Person Centered Planning and Self-Determination” (Slide 31)**
 - Insure you alert attendees that they can have the development of a person centered plan funded while they are still in traditional services.



- **”Jason and Sofia Examples” (Slide 32)**
 - Be sure to take your time in reviewing these examples. In taking your time, consider that instead of reading the entire plan, you focus on one goal. For example, the fact that Jason likes to garden. Talk about how by learning what Jason likes (gardening) and wants (a job) the team could come up with an exciting and achievable outcome.
 - Focus on Jason and Sofia as real people with real gifts, talents, and dreams. It will help the attendees connect the importance of person-centered planning to the full opportunities of the Self-Determination Program.





- **”IPP and Self-Determination (Slide 33)**
 - This is where you link the Person Centered Plan that the participant may have developed in a separate meeting to the documentation required in the IPP. The IPP is the written document that is informed by the Person Centered Plan. Just like in traditional services, it clarifies specifics. In the Self-Determination Program it also has the Spending Plan attached, this is like a line item budget that outlines every service and support that will be funded from the Individual Budget. Assure the attendees you will be going more in depth on the Budget and Spending Plan very soon.



- **to ”Requirements of Planning for Services” (Slides 34 to 37)**
 - Best to reference the slide notes clearly on these slides. These slides are best delivered in partnership too. Instead of coming across like the Regional Center

is setting rules the message that is delivered becomes taking responsibility for participation as agreed upon with the federal government.

- Use the DDS handout regarding the “Final Rule.” Give context, explain why it is called the “final rule” and the fact that families and self advocates worked hard to make these inclusive and community based changes.
- Take the time to explain the reason for using generic resources, not just because it is a “rule” that the feds imposed but because using generic resources is your right, people fought hard to be able to access the community. Also using generic resources saves money; money from the Individual Budget. By the way, explain what a “generic” resource is, most people do not really understand what that term means.
- Section Four: Paying for Services and Supports
 - This section is broken into three distinct subsections:
 - The Individual Budget
 - The Spending Plan
 - The Financial Management Service (FMS)
- Subsection One: The Individual Budget
 - Questions tend to come up in this section as individuals try to understand how the budget is certified. These are pretty straight forward slides on this subject. Services that had been approved but were not available and services that the participant was not aware of but has an identified need for are examples of reasons why the budget can be adjusted. A good rule of thumb is to be sure that the support or service would have been funded by the regional center regardless of the decision to participate in the SDP. Then the cost of that service or support is factored into the Individual Budget.
 - A parent or self advocate delivering the message on the Individual Budget lends credibility and builds trust.
 -  to “Individual Budget: Jason and Sofia” Slides (Slides 46 to 48)
 - Use the handout for reference but the slides have the actual math and simple graphics, so it is suggested to leave the slides up as you walk through this.
- Subsection Two: Spending Plan
 - For these slides you will find the Jason and Sofia examples extremely helpful. This is a good place to walk through the process of planning again, emphasizing the importance of a strong person centered plan. For example, “Let’s review where we are in the process: We started with that rich person centered plan, which informed the written IPP document, we know the Individual Budget amount, now we are going to do some real work about mapping out the costs of the services and supports and getting that into a line item budget, or Spending Plan as it is called.” It is important to reinforce that everything starts with the plan not the services, and, again having a parent or self advocate repeat that message is powerful.
 -  “Budget Categories” (Slide 52)
 - This is where you want to reference the SDP Service Definitions handout with the caveat that is not to be considered a list of services and not where the

process starts. (Remember, we just reviewed the process starting with the person centered plan) This document outlines what are considered “billable services” in the Self-Determination Program, unlike what we are all used to this is not Purchase of Service Policies that are approved or denied, they are definitions. You and your Service Coordinator will figure out how the services and supports you identified as part of your spending plan match these definitions. You will also figure out which category they fit in.

- You may find that you are going back and forth between the PowerPoint and handouts on the Jason and Sofia slides in this subsection and that is okay. It is important to walk through how the spending plan was developed, with particular focus on the use of natural and generic resources.



- **“Spending Plan Activity” (Slide 57)**
 - Don’t get too bogged down in details. Help the attendees to get the concept by asking them to focus on just one service or support. Tell them to just estimate. The goal here is to help them get the concept of developing a spending plan, not to specifically and accurately fill out the worksheet.

This may be a good place for a lunch break if you are doing an all day session

- Subsection Three: Financial Management Service (FMS)
 - While most people think this is the most “complex” part of the training and, tend to be intimidated to have to present on this topic, you will see that this guide is not going slide by slide or even as in depth as it did in other sections. Why is this? It is because as a trainer for this Orientation you do not need to be the subject matter expert on the FMS. In fact, you will find yourself going off on tangents and going down rabbit holes if you feel you must know everything and answer every question about the FMS.
 - Some basic advice for all of these slides:
 - Review them ahead of time thoroughly
 - Keep it simple
 - You are reviewing the definition of the FMS
 - You are pointing out that there are three types of FMS
 - You are pointing out that if participants are hiring staff, they should look at the relationship they want to have with those staff to determine if they want to be a sole employer or co employer
 - Stick to the notes and use the Jason and Sofia examples-they keep the learning on track.
 - If you don’t know something, admit it, take down the question, and follow up with that attendee later or assure the group you will research the question and get the information out to everyone (and have a plan to do so within a reasonable timeframe.)
 - When you get a specific question about FMS services, liability, taxes etc...do not give advice, instead point out to the attendee that such a question is a great one to ask a FMS when you are deciding which FMS with whom to work.

- Some regional centers are considering having FMS providers on hand after orientation for attendees to interview and ask those specific questions.



- ["FMS Discussion Activity" \(Slide 73\)](#)
 - During the Train the Trainer on this curriculum we had cards with scenarios for large and small group discussion. You can do this or you can ask attendees to think about their own plans and, based on what they learned, how they envision working with a FMS.

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- Section Five: Your Rights and Safety
 - This section may feel out of place but there is a reason for that. This section captures all the important protections in place and is an opportunity to help attendees step up and embrace the authority and responsibility inherent in The Self-Determination Program. The best preventative for rights violations, abuse, or neglect is information, empowerment, and Self Advocacy.
 - Your community may want to consider weaving this material into the Orientation within the other sections, that is up to you. What is important to remember is that the topics covered do need to be part of the Orientation.
 - It is suggested that the Regional Center Consumer Advocate or a strong Self Advocate cover the Recognizing and Reporting Abuse slides.
 - Be prepared! When training on Recognizing and Reporting Abuse an unfortunate fact is that many individuals with developmental disabilities have been victimized. You may find that you have attendees who want to share their personal stories of abuse. Be prepared to listen and follow up as appropriate. Follow up may range from connecting that person to resources such as counseling or support groups to making a report to the authorities.
 - This section is a teachable moment about how Regional Centers track "Special Incidents" FMS providers must comply with all vendor requirements outlined in Section 54327 of Title 17, including reporting to the regional center any special incidents, as defined in that section, that the FMS has knowledge of or that has been reported to the FMS by the participant, a service provider, or other person. Why is this important to know? It is part of the support for participants. Circle back around to a meaningful Person Centered Plan, having a meaningful life in the community usually means being safe and free of fear. Help attendees think about how they would include that in their planning in terms of who would they turn to for help and who do they trust?
- Section Six: Next Steps
 - These are really your slides for the Regional Center and Local Advisory Committee to have the freedom to outline what the next steps are for participants. This can range from reminding people about resources for Person Centered Planning available prior to enrollment, to explaining how cases are assigned at your Regional Center. Be sure to connect the importance of the Local Advisory Committee, these first participants just might make great Committee members some day!



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So Now What?

Hopefully you feel a little more prepared to implement the Orientation. However, if you still want some support:

- Email Liz Harrell at liz.harrell@sdrc.org with specific curriculum or training questions
- Email sdp@dds.ca.gov with specific Self-Determination Program questions

Best of Luck and Enjoy Learning Together!

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