

Date(s) of Evaluation: <u>11/22/2019</u>	Completed by: Terri Rowland & Sam Jones
Vendor Name, Address, Contact: Milestones Adult Development Center 1 Florida St. Vallejo, Ca. 94590 Terri Rowland	
Vendor Number: 510 Vendor Number HN0356 & 055 Vendor Number PN0716	
Service Type and Code: <u>510 and 055</u>	

<p><b><u>Federal Requirement #1:</u></b>  <i>The setting is integrated in, and supports full access of individuals receiving Medicaid HCBS to the greater community, including opportunities to seek employment and work in competitive integrated settings, engage in community life, control personal resources, and receive services in the community, to the same degree of access as individuals not receiving Medicaid HCBS.</i></p>	<p><b><u>Guidance:</u></b></p> <ul style="list-style-type: none"> <li>• Do individuals receive services in the community based on their needs, preferences and abilities?</li> <li>• Does the individual participate in outings and activities in the community as part of his or her plan for services?</li> <li>• If an individual wants to seek paid employment, does the home staff refer the individual to the appropriate community agency/resource?</li> <li>• Do individuals have the option to control their personal resources, as appropriate?</li> </ul>
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**Does the service and/or program meet this requirement?**  Yes  No Please explain: Milestones does not fully meet this requirement. Individuals at Milestones have opportunities daily for community integration, but not many for volunteer and paid CIE. Not all participants at Milestones demonstrate the ability to choose or describe how they access the community due to communication challenges. Individuals are supported by staff to access the community as most of the participants at Milestones require 1:1 staffing when in the community due to their needs. Milestones offered a stipend for onsite work but stopped it to work on coming into compliance. Many individuals attending Milestones bring their own money and Milestones has some petty cash to give to individuals who do not bring

money so they can make a purchase or gain entrance to recreation choices in the community.

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**Federal Requirement #2:**

*The setting is selected by the individual from among setting options, including nondisability-specific settings and an option for a private unit in a residential setting. The setting options are identified and documented in the person-centered service plan and are based on the individual's needs, preferences, and, for residential settings, resources available for room and board.*

**Guidance:**

- Does the provider have a current regional center Individual Program Plan (IPP) on file for all individuals?
- Does each individuals' IPP document the different setting options that were considered prior to selecting this setting?

**Does the service and/or program meet this requirement?**  Yes  No Please explain: Most of the participants have a current IPP with addendums as needed for any updates required. Many individuals started at Milestones 25 years ago. The current IPP documents do not state any setting options that were considered prior to selecting Milestones. There have been quality assurance assessments conducted in which the participant or family member continue to choose Milestones. Interviews occurred prior to the NBRC audit to ensure all participants are happy with attending Milestones. An interview was also conducted by NBRC Quality Assurance team as a sample of the satisfaction of attending Milestones. Those interviewed enjoyed the opportunities offered and Milestones is working toward educating individuals on other possible opportunities with CIE and volunteer work.

**Federal Requirement #3:**

*Ensures an individual's rights of privacy, dignity and respect, and freedom from coercion and restraint.*

**Guidance:**

- Does the provider inform individuals, in a manner they can understand, of their rights to privacy, dignity, respect, and freedom from coercion and restraint?
- Does the provider communicate, both verbally and in writing, in a manner that ensures privacy and confidentiality?

	<ul style="list-style-type: none"> <li>• Do staff communicate with individuals based on their needs and preferences, including alternative methods of communication where needed (e.g., assistive technology, Braille, large font print, sign language, participants' language, etc.)?</li> </ul>
<p><b>Does the service and/or program meet this requirement?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Please explain: Milestones continues to train on rights to privacy, dignity, respect and freedom from coercion and restraint although there is always room for improvement to ensure all receive the same rights from all staff for what works best individually for each participant. Milestones serves many individuals with communication challenges but works with a Speech Therapist to find methods of communication that work best for each participant. Milestones also conducts sign language classes to assist staff in communicating using gestures and signs according to individual needs. Some participants communicate through computers but it takes time to access resources and set up the appropriate device according to individual need and Milestones needs to improve in finding resources that are more efficient.</p>	
<p><b><u>Federal Requirement #4:</u></b>  <i>Optimizes but does not regiment individual initiative, autonomy, and independence in making life choices, including, but not limited to, daily activities, physical environment, and with whom to interact.</i></p>	<p><b><u>Guidance:</u></b></p> <ul style="list-style-type: none"> <li>• Does the provider offer daily activities that are based on the individuals' needs and preferences?</li> <li>• Does the provider structure their support so that the individual is able to interact with individuals they choose to interact with, both at home and in community settings?</li> <li>• Does the provider structure their support so that the individual is able to participate in activities that interest them and correspond with their IPP goals?</li> </ul>
<p><b>Does the service and/or program meet this requirement?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Please explain: Although Milestones provides choices of many daily activities, there are some participants who would like to get into the community more often but need individual supports to access the community. The resource of individual vehicles for access is limited at this time so many go into the community in larger groups. Sometimes individuals want to stay out longer or come back to Milestones sooner</p>	

which is difficult when more people are on transportation to consider their choice. Many participants choose who they want to interact with as they ambulate or wheel themselves to their favored peer and staff. The participants with communication challenges usually use facial gestures to communicate they are happy or not with their staff and peers near them. Individuals who do not demonstrate preference are observed by staff to see if they like their staff or not and will make changes to staffing as necessary.

**Federal Requirement #5:**

*Facilitates individual choice regarding services and supports, and who provides them.*

**Guidance:**

- Does the provider support individuals in choosing which staff provide their care to the extent that alternative staff are available?
- Do individuals have opportunities to modify their services and/or voice their concerns outside of the scheduled review of services?

**Does the service and/or program meet this requirement?**  Yes  No Please

explain: Participants choose their staff through their own method of communication. Some do not use speech or a communication device but can communicate likes and dislikes through facial gestures. Milestones has a grievance form that is part of the initial admission packet and is reviewed at the annual person centered planning INSP meeting. Milestones is not meeting this requirement for voicing concerns outside of the scheduled initial and annual meeting. Milestones is working on revamping the website and will include a grievance procedure form and other information of ways to voice concerns outside of scheduled review of services, besides staff viewing and meeting with individuals when attending day program.

Only providers of services in **provider-owned or controlled residential settings** need to complete the remainder of this evaluation. In **provider-owned or controlled residential settings**, in addition to the above requirements, the following requirements must also be met:

**CONTACT INFORMATION**

Contact Name: Terri Rowland(Excecutive Director) Sam Jones(HCBS Trainer)

Contact Phone Number: 707-310-0443 707- 694-5681

Email Address:[TerriR@milestonesofdevelopment.org](mailto:TerriR@milestonesofdevelopment.org)  
[Samj@milestonesofdevelopment.org](mailto:Samj@milestonesofdevelopment.org)

## ACKNOWLEDGEMENT

By checking the box below, I acknowledge that completion of this evaluation is for the sole purpose of applying for compliance funding and does not take the place of future provider assessments that the Department may require to determine provider compliance with the HCBS settings rules.

I AGREE

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Vendor name	Milestones Adult Development Center
Vendor number(s)	510 Vendor Number HN0356 & 055 Vender Number PN0716
Primary regional center	North Bay Regional Center
Service type(s)	Adult Day Center with medical component
Service code(s)	510 and 055
Number of consumers currently served	85
Current staff to consumer ratio	1:2 and 1:3 ratio
<p>1. Please provide a brief description of the service/setting that includes what a typical day consists of and how services are currently provided. This response must include the baseline/current levels for any aspects of the program for which the concept proposes funding.</p> <p>Once an individual arrives at Milestones they have options from participating in ceramics, painting, community outings, computer classes, sensory motor, creating crafts, and walking on the waterfront. Milestones also offers musical activities, dancing, singing, sign language, and weekly cooking classes. Individuals we serve are offered snacks and also bring their lunch unless they choose to eat out. Hoyer lifts are used for mat access and toileting needs.</p>	
<p><b>Project Narrative Description:</b></p>	
<p>2. Please provide a brief summary narrative of the concept for which you are requesting funding, including justification for the funding.</p> <p>Milestones requests funding to have the ceramic instructor open up our ceramic studio to the public to offer the ceramic services to individuals and our community. This will provide a community setting and also have individuals learn and create with people in</p>	

their community. Request to get iPads and other technology that will help individuals who are non-verbal be able to communicate and express their wants and needs. Job coaches would help individuals learn job skills. Job developers needed as well so that the resources they have on finding employment is utilized. In addition, we are also we requesting 2 Braun Ability SUV's so transportation can be provided on a 1:1 basis.

3. Identify which HCBS federal requirements this concept addresses that are currently out of compliance. Could be all or a subset of those identified as out of compliance on the evaluation.

1  2  3  4  5  6 \_\_\_ 7 \_\_\_ 8 \_\_\_ 9 \_\_\_ 10 \_\_\_

Milestones is in compliance partially with some but if not in full compliance, the box was marked with an X. All 5 of the federal requirements are either fully or partially put of compliance.

4. For each HCBS out-of-compliance federal requirement that is being addressed by this concept, describe the barriers to compliance and why this concept is necessary. If this information is in the evaluation section, please copy it here.

Milestones has an operational ceramic studio with one kiln, some supplies but not all, and an instructor. Milestones is requesting funding to get additional supplies needed to open the studio to the public. Milestones plans to invite the community who express interest in learning ceramics to visit Milestones and participate with the individuals we serve who also express interest in clay, ceramics, and painting. Currently Milestones has received funding for one job developer consultant for 1 year to be hired by June 2020. Milestones would like to continue that position for another year and hire a 2<sup>nd</sup> job developer consultant. Currently Milestones does not employ any job coaches. Some of Milestones staff are interested in learning how to be a job coach. Most of the individuals we serve need 1:1 when in the community. Milestones is requesting funding for 4 additional staff to work with the individuals we serve in CIE or volunteer opportunities in a job coaching position.

5. For each out-of-compliance federal requirement that is addressed in this concept, please explain how the concept will bring the vendor into compliance.

Inviting the community to join Milestones for ceramic lessons and classes will provide opportunities for interactions and for the individuals we serve to meet new people. This opportunity may also provide networking for possible CIE work. iPads will assist in enhancing communication methods so individuals with communication challenges will have the opportunity wants and needs. Using the communication software provides opportunity for new interests to arise. Milestones will be hiring a job developer in 2020 with grant money received from previous HCBS grant. Milestones is requesting 1 other job developer to assist with finding CIE & volunteer opportunities. Job coaches will help individuals we serve learn job task on CIE sites as well as volunteer duties. The smaller vehicles give access on individual basis to access CIE/volunteer and community activities.

6. What are the proposed outcomes and objectives of the concept, and what are the methods of achieving and tracking them?

The individuals we serve will have the opportunity to increase knowledge of their interest in the community. Opportunities for CIE and volunteer work will be expanded. With the smaller vehicles it gives people the opportunity to go access the community individually or in small groups. The form from the HCBS "train the trainer" training will be used to document interests, dislikes, and opportunities provided.

7. Please describe how and/or what was done to include input from the individuals served in developing this concept? Discuss not only the development of the concept, but also what steps were taken to identify the interests and desires of the individuals and who was involved in that process.

Concept –  
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## Home and Community- CONCEPT FORM

Milestones met with the individuals we serve to find out what they wanted to see different. The staff brainstormed with individuals on things they want to see change. Milestones is implementing a weekly pow-wow between the staff and individuals we serve so that their wants and needs are documented for making plans and decisions. The outcome of the meetings with the individuals we serve showed they would like to have paid work, chosen volunteer work, and some wanted to have a wide variety for community activities. Some individuals we serve would like to have later afternoon activities. Milestones will provide the transportation to afternoon activities. The funding for the SUV's for more individual transport will assist with the restructure of their day for their choices to occur.

8. Please describe how the concept you propose will enable you to provide more personcentered services to your clients.

The concepts proposed will promote independence, choice, and provide more opportunities for the individuals we serve. The concepts also provide for individual transport with the community as well as afternoon choices selected. The individuals we serve can have their typical 6 hour day restructured to work/volunteer at a later time and return home at their choosing.

9. Please address your plan for maintaining the benefits, value, and success of your project at the conclusion of 2019-20 HCBS Funding.

Milestones continues to support legislative efforts from CDSA to advocate for a rate increase. Milestones participated in the rate study and looking for an increase in the current rate to assist with sustaining the value, benefit and success of our project. Milestones will continue to increase partnership with business in the community to assist with fundraising. Milestones will also review and possibly reorganize the organizational

structure to include the job coach positions and job developer consultant for continued success.

10. Write a brief narrative below explaining each major cost category and timeline. Complete the budget template at the end of the concept sheet. An excel version with formulas is available. When applicable, budgets should include personnel/benefits, operating costs such as consultants or training, administrative expenses/indirect costs, and capital costs (assets lasting more than 2 years). If project spans 2 years or occurs in phases, budget should be separated by phase/year.

Administrative costs, if any, must comply with DDS' vendor requirements, including a cap of 15% of the sum of personnel/benefits, consulting, and operating costs (must exclude capital costs).

[http://leginfo.legislature.ca.gov/faces/codes\\_displaySection.xhtml?sectionNum=4629.7&lawCode=WIC](http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=4629.7&lawCode=WIC)

Job coaches for assisting the individuals we serve in CIE and volunteer work. Hire within 6 months after receiving the grant award. iPads will be used to assist individuals we serve who are non-verbal with expanding their communications skills leading to expanding interests in the community. Vehicles for accessing the community for individual and or small groups. Order vehicles within 3 months of the award. Begin marketing the studio within 2 months after receiving the grant award. Purchase supplies within 2 months of receiving grant award for ceramic supplies/kiln and 3 months for marketing. Purchase iPads within a month of receiving grant award. Milestones received the grant for the first year for a job developer and requesting that to continue the second year and a 2<sup>nd</sup> job developer consultant for 2 years. Second job developer will be hired within 6 months of receiving the grant award.

11. Please address sustainability of funding sources for all programs or concepts requiring any funding past the time frame of the requested grant, especially those that involve staff or other long-term costs. Please mark "not applicable" if costs will all be incurred during the program time frame.

Milestones continues to support legislative efforts from CDSA to advocate for rate increases. Milestones participated in the rate study and looking for an increase in the current rate to assist with sustaining the value, benefit, and success to our project. Milestones will continue to increase partnership with businesses in the community to assist with fundraising.

12. Have you or the organization you work with been a past recipient of DDS funding? If yes, what fiscal year(s)?

HCBS Funding \_\_\_ No  Yes. If Yes, FY(s) 2019  
Disparity Funding  No \_\_\_ Yes. If Yes, FY(s) \_\_\_\_\_  
CPP Funding \_\_\_ No  Yes. If Yes FY(s) 2007-08

If yes to any question be sure to answer questions 13 and 14.

**For providers who have received prior HCBS, Disparity or CPP Funding from DDS**



13. If your organization has received prior funding from any of the above sources, please provide an update on the prior funding project. You may copy and paste from progress update(s) previously provided to regional centers or DDS.

Milestones has sent two employees to the two day "train the trainer" training. We have hired a consultant to assist with coming into compliance with HCBS regulations. The two employees that attended the two day training are in the process to be certified HCBS trainers who will train the rest of the staff on how to be person centered planning/thinking. Milestones has also received funds for a job developer position that is to be hired in 2020.

14. If your organization received prior funding, please explain how the current funding request is not redundant with any prior funding received and/or builds on the prior funding but was not part of the original funding.

Milestones focused on getting two people trained on person centered thinking and have taken steps with consultants to get into compliance. Funding being requested now is focused on integration in the community, CIE, and volunteer work opportunities. Funding a 2<sup>nd</sup> job developer can assist with moving Milestones further on CIE. The smaller vehicles will provide for individual or small ramp access to get to CIE/Volunteer opportunities as well as activities in the community for individual choice. iPads will assist with interviews, for decision making, and possible expansion of interest in the community.

HCBS CONCEPT BUDGET						
Vendor Name						
Vendor Number(s)						
	Salary and Benefits	Year 1 Budget		Year 2 Budget		Total
		FTE	Annual Cost	FTE	Annual Cost	Cost
<b>Personnel (salary + benefits)</b>						
Job coach	1,125	40.00	\$ 45,000	40.00	\$ 45,000	\$ 90,000
Job coach	1,125	40.00	\$ 45,000	40.00	\$ 45,000	\$ 90,000
Job coach	1,125	40.00	\$ 45,000	40.00	\$ 45,000	\$ 90,000
Job coach	1,125	40.00	\$ 45,000	40.00	\$ 45,000	\$ 90,000
Position Description			\$ -		\$ -	\$ -
Position Description			\$ -		\$ -	\$ -
Position Description			\$ -		\$ -	\$ -
Position Description			\$ -		\$ -	\$ -
Position Description			\$ -		\$ -	\$ -
<b>Personnel Subtotal</b>			<b>\$ 180,000</b>		<b>\$ 180,000</b>	<b>\$ 360,000</b>
<b>Operating expenses</b>						
Vehicle insurance			\$ 4,190		\$ 4,190	\$ 8,380
Vehicle signage			\$ 400			\$ 400
ceramic art supplies			\$ 6,500		\$ 6,500	\$ 13,000
kiln			\$ 1,735			\$ 1,735
marketing			\$ 1,000		\$ 1,000	\$ 2,000
iPad			\$ 360			\$ 360
iPad			\$ 360			\$ 360
iPad			\$ 360			\$ 360
iPad			\$ 360			\$ 360
iPad			\$ 360			\$ 360
<b>Operating Subtotal</b>			<b>\$ 15,625</b>		<b>\$ 11,690</b>	<b>\$ 27,315</b>
<b>Administrative Expenses</b>						
job developer consultant			\$ 25,000		\$ 25,000	\$ 50,000
job developer consultant			\$ 25,000		\$ 25,000	\$ 50,000
						\$ -
						\$ -
						\$ -
						\$ -
						\$ -
<b>Administrative Subtotal</b>			<b>\$ 50,000</b>		<b>\$ 50,000</b>	<b>\$ 100,000</b>
<b>Capital expenses</b>						
converted Ford SUV's/Braun Ability			\$ 31,215			\$ 31,215
converted Ford SUV's/Braun Ability			\$ 31,215			\$ 31,215
						\$ -
						\$ -
						\$ -
						\$ -
						\$ -
						\$ -
<b>Capital Subtotal</b>			<b>\$ 62,430</b>		<b>\$ -</b>	<b>\$ 62,430</b>
<b>Total Concept Cost</b>			<b>\$ 308,055</b>		<b>\$ 241,690</b>	<b>\$ 549,745</b>

See Attachment F for budget details and restrictions