

SDICDSI Board and Committee Meetings

Tuesday, August 12, 2025

10:00 – 11:00

Personnel Committee – Suite 203

Legislation Committee – Suite 300

11:00 – 11:45

Finance Committee – 9449 Balboa Ave, Suite 300

Client Advisory Committee – Ruffin Rd, Suite 300

11:45

Lunch – Boardroom

12:00 – 1:30

Board Meeting – Boardroom

1:30 – 2:30

Audit Committee – 9449 Balboa Ave, Suite 300

Nominating and Bylaws Committee – Suite 205



San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdrc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

MEETING NOTICE
Board of Directors Meeting

San Diego Regional Center Board Room and by Zoom Webinar
Tuesday, August 12, 2025

12:00 p.m.

- | | | |
|-----|---|-----------------|
| 1. | Call to Order/Announcements | Tessie Bradshaw |
| 2. | Mission Moment | Pamela Starmack |
| 3. | Presentation on Cultural and Linguistic Competency | Clorinda Merino |
| 4. | Public Input | |
| 5. | Approval of the Minutes
– June 10, 2025, Board Meeting (Action Item) | Tessie Bradshaw |
| 6. | Chair's Report
– Conflict of Interest Policy (Action Item) | Tessie Bradshaw |
| 7. | Executive Director's Report
– Employees of Distinction | Mark Klaus |
| 8. | Finance Committee Report | Matthew Storey |
| 9. | Association of Regional Center Agencies (ARCA) Update | Terri Colachis |
| 10. | Vendor Advisory Committee Report | Wendy Forkas |
| 11. | Legislation Committee Report | Chris Hodge |
| 12. | Personnel Committee Report | Laura Oakes |
| 13. | Client Advisory Committee Report | Erik Rascon |
| 14. | Mission Moments | |
| 15. | Adjourn | |

The next meeting of the Board of Directors will be held on
Tuesday, September 9, 2025, at 12:00 p.m.

*Our mission is to serve and empower persons with developmental disabilities
and their families to achieve their goals with community partners.*

Components of an Ideal Board Meeting

	Everyone stays engaged for the entirety of the meeting.
	Includes an interesting and understandable education presentation.
	Open and honest communication.
	People ask clarifying questions.
	Tough topics are addressed.
	An in-depth Executive Director's report is given.
	There are discussions about how to benefit the lives of clients.
	Large attendance by board members.
	People leave the meeting with enthusiasm and empowerment, feeling like they made a difference.
	There is a good sound system, and people understand each other.



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BOARD OF DIRECTORS MEETING

June 10, 2025

Minutes

DIRECTORS PRESENT: Tessie Bradshaw, Elmo Dill, Pamela Ehlers, Wendy Forkas, James Gonzalez, David Hadacek, Chris Hodge, Yasuko Mason, Laura Oakes, Norma Ramos, Julie Randolph, Erik Rascon, Kimberly Rucker, Matthew Storey, Mark Uyeda, Taylor Wiesner, and Cali Williams

DIRECTORS ABSENT: Virginia Bayer, Terri Colachis

STAFF PRESENT: Lorelee Bada, Robin Bello, Celeste Graham, Rafael Gaucin, Rebecca Hamada, Maria Hanks, Rachel Hefler, Mark Klaus, Kaydence Ketterer, Saralynn Keenan, Kate Kinnamont, Miguel Larios, Christine Lux-Whiting, Seth Mader, Dulce Morin, Gabriella Ohmstede, Victoria Otero, Lisest Perez, Pedro Salcedo, Bonnie Sebright, Reyna Soto, Pamela Starmack, Kimberly Steitz, and Robert Webb-Rex

GUESTS PRESENT: Shahriar Afshar, Greg Alcantra, Patricia Barber, Cori Bullard, Graham Bullard, Matt Bullard, Hunter Christian, Michelle Emerson, Lisa Gooden, Shelly Gonchoroff, Myles Horttor, Samantha Jones, Debbie Marshall, Melissa Malone-Montgomery, Sandra Rocco Melville, Molly Nocon, Vrian Nero, Mario Perez, Raymond Peterson, Edwin Pineda, Rene Rodriguez, Pedro Salcedo, Lori Scabercio, Todd Shetter, Aracely Smith, Stacy Sullivan, A.J. Tota, Gary Walker, Joan Walker Scott, Becky Williams, and Reyna Zavala

1. **Call to Order**

David Hadacek, Chair, Board of Directors, welcomed everyone in attendance and called the meeting to order at 12:03 p.m.

2. **Mission Moment**

Pamela Starmack shared a video highlighting one of San Diego Regional Center's (SDRC) clients, and his family as they discussed their experience working with Dani Bowman from DaniMation Entertainment. This program supports individuals on the spectrum in developing animation skills, with the potential to pursue it professionally.

3. **Presentation**

Mr. Hadacek presented information on the conflict of interest reporting requirements for all regional center Board Directors.

4. **Public Input**

Brian Nero, Vice President of Employment Services at Options for All, discussed a nine-month internship program that prepares SDRC clients for employment. Upon completion of the program, participants had the opportunity to apply for positions they had interned in, leading to seven successful hires at Legoland California.

Todd Shetter from ActivCare Living discussed a hybrid residential and nursing program designed for

individuals with intellectual disabilities and dementia. ActivCare Living staff have received training from staff at Noah Homes to better serve individuals with developmental disabilities. ActivCare is expanding to four locations in San Diego County.

Hunter Christian, Executive Director of Villa de Vida, announced their annual fundraiser, Fiesta de Vida, scheduled for June 22 at the TERI Campus of Life in San Marcos.

5. **Approval of Minutes**

Mr. Hadacek referred the Directors to the minutes of the May 13, 2025, Board of Directors meeting and asked for approval.

MOTION: M/S/C that the draft minutes of the May 13, 2025, Board of Directors meeting are approved as submitted.

6. **Chair's Report**

Mr. Hadacek reminded Board Directors to complete the email survey to confirm their attendance at the Board of Directors retreat.

7. **Executive Director's Report**

Mark Klaus reported that the total SDRC caseload has increased to 46,022. The total SDRC caseload has increased by 3,093 since the beginning of the fiscal year on July 1, 2024.

Mr. Klaus announced the following upcoming events, the Self-Determination Conference on June 26, the Family Resource Fair on October 4 at the San Diego Convention Center, a Housing Symposium on October 20, and an Employment Symposium on December 2.

Mr. Klaus referred Directors to the May 22, 2025, Department of Developmental Services (DDS) Directive regarding the regional center governing board approval of contracts. Mr. Klaus reported that this directive was discussed in the Finance Committee meeting earlier in the day and offered to address any questions related to the directive.

Mr. Klaus recognized Liset Perez as an Employee of Distinction.

8. **Finance Committee Report**

Yasuko Mason, reporting on behalf of Treasurer Matthew Storey, stated that the Finance Committee had met earlier in the day to review the proposed service provider contracts and recommended Board approval for all seven contracts.

MOTION: (Forkas & Oakes abstained) M/S/C to approve the contracts for services with PY3872 Brilliant Corners (acquisition), PY2851 Brilliant Corners (acquisition), PY3872 Brilliant Corners (renovation), PY2851 Brilliant Corners (renovation), HQ2241 Casa Luna Care LLC, HQ2239 Jeff Jackson DBA Panchito's Place, HQ2080 Unexpected Possibilities Inc. DBA Unexpected Possibilities.

Ms. Mason referred Directors to the fiscal year (FY) 2025-2026 Regional Center B-1 Contract Amendment included in the Board meeting materials.

MOTION: M/S/C to approve the FY 2025-26 Regional Center B-1 Contract Amendment

Ms. Mason informed Directors of the DDS Directive on Regional Center Governing Board Approval of Contracts.

9. **Association of Regional Center Agencies (ARCA) Update**

Mr. Klaus reported on behalf of Terri Colachis that ARCA's Annual Meeting will take place on June 26 and 27, during which new officers and committee chairs will be elected.

He also announced the upcoming retirement of Melinda Sullivan, Executive Director of Lanterman Regional Center.

Mr. Klaus expressed that ARCA is focusing on board training programs, legislation, and the state budget.

10. **Vendor Advisory Committee Report**

Wendy Forkas reported that vendors were required to complete and submit rate model implementation acknowledgement forms to DDS by the end of May. All service providers were required to log in to the DDS Portal and confirm their vendor number. Ten percent of the service providers' full rate is tied to this activity.

Ms. Forkas shared that the Lanterman Coalition Rally on May 22, 2025, was highly successful, with more than 1,000 self-advocates reaching out to their legislators afterward to share their experiences and voice their opposition to Medicaid cuts through the Lanterman Coalition's online platform.

The next meeting of the Vendor Advisory Committee is scheduled for July 24, 2025, and the next Developmental Disabilities Provider Network (DDPN) meeting will take place on June 19, 2025.

11. **Nominating and Bylaws Committee Report**

Norma Ramos reported on behalf of Virginia Bayer that the Nominating and Bylaws Committee recommends that the Board approve the revisions to the Corporate Bylaws.

MOTION: M/S/C to approve the Corporate Bylaws.

Ms. Ramos reported that the Nominating and Bylaws Committee last met on May 13, 2025, reviewing Board member retirements and upcoming recruitment efforts.

12. **Legislation Committee Report**

Chris Hodge reported that the Legislation Committee met earlier in the day to review three legislative bills and discuss the status of the state budget process. Mr. Hodge stated that the budget is expected to be approved by the state legislature by June 15, 2025.

Mr. Hodge informed the Directors that this year marks the 40th anniversary of the landmark California Supreme Court case *ARC v. Department of Developmental Services*, decided on March 21, 1985, which upheld the rights of individuals with developmental disabilities under the Lanterman Act.

13. **Personnel Committee Report**

Laura Oakes reported that the Personnel Committee met earlier in the day and discussed revisions to the employee handbook.

Ms. Oakes reported that the members of the Personnel Committee recommended that the Board of Directors approve the revisions to the employee handbook.

MOTION: M/S/C to approve the Employee Handbook.

14. **Client Advisory Committee Report**

Mr. Rascon reported that the Client Advisory Committee's meeting was on June 10th, during this meeting, they discussed preparing a presentation on Anti-Bullying. He reported that the committee discussed the Medicaid budget cuts and how the cuts will affect clients and their families.

Mr. Rascon reported that Cali Williams shared that the St. Madeleine Sophie's Fashion Show will take place on July 2, 2025. He also explained that Taylor Wiesner gave an update on the San Diego People First meeting. They are planning to hold a conference in 2026.

15. **Mission Moments**

Ms. Ramos shared that her family was able to host a celebration at their home for the first time in 10 years, which was a meaningful milestone made possible by the support staff working with her son.

Pamela Ehlers shared that her son recently obtained his driver's license. She expressed gratitude to the Independent Living Skills (ILS) staff member who supported him to achieve this goal.

Ms. Williams shared that she called Assemblymember Dr. LaShae Sharp Collins to sing "Happy Birthday" to her.

Miguel Larios presented a video of the graduates from Options for All.

16. **Adjournment/Next Meeting**

There being no other business, the meeting adjourned at 1:13 p.m. The next meeting of the Board of Directors is scheduled for Tuesday, August 12, 2025, at 12:00 p.m.



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Memorandum

DATE: August 5, 2025
TO: Board of Directors
FROM: Mark Klaus
RE: Conflict of Interest Policy

The Board first approved the Conflict of Interest Policy on July 12, 2011. Attached are proposed revisions to the Conflict of Interest Policy based on the Welfare and Institutions Code (WIC) 4626.5 amendments by [Bill Text - AB-1147 Disability Equity, Transparency, and Accountability Act of 2024](#).

The proposed revisions are in red font and outline new policies that prohibit staff from accepting gifts from a service provider, an SDRC client, or a family member of a client valued over fifteen dollars (\$15) per year and prohibit senior staff from hiring family members. The proposed revisions will be presented for the Board's consideration and action at the August 12, 2025 Board meeting.

Please contact me if you have any questions.



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Conflict of Interest Policy for the San Diego-Imperial Counties Developmental Services, Inc. and the San Diego Regional Center

The Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (SDICDSI) gives a high priority to ensuring that members of the Board of Directors and employees act in the course of their duties solely in the best interests of the San Diego Regional Center (SDRC) consumers and their families without regard to the interests of any other organization with which they are associated or persons to whom they are related. Board members, employees, and others acting on the regional center's behalf will be free from conflicts of interest that could adversely influence their judgment, objectivity, or loyalty to the regional center, its consumers, or the corporate mission.

In order to prevent potential conflicts of interest, no member of the Board of Directors will be any of the following:

- (1) An employee of the Department of Developmental Services (DDS) or any state or local agency that provides services to an SDRC consumer, if employed in a capacity which includes administrative or policymaking responsibility, or responsibility for the regulation of the SDRC.
- (2) An employee or a member of the State Council on Developmental Disabilities or an area board.
- (3) Except as otherwise provided in subdivision (h) of Section 4622 of the Welfare and Institutions Code, an employee or member of the governing board of any entity from which the SDRC purchases consumer services.
- (4) Any person who has a financial interest, as defined in Section 87103 of the Government Code, in regional center operations, except as a consumer of SDRC services.

A person with a developmental disability who receives employment services through a regional center provider shall not be precluded from serving on the Board of Directors of the SDRC based solely upon receipt of these employment services.

The SDICDSI and SDRC will ensure that no member of the Board of Directors or employee has a conflict of interest with an entity that receives regional center funding, including, but not limited to, a nonprofit housing organization and an organization qualified under Section 501(c) (3) of the Internal Revenue Code, which actively functions in a supporting relationship to the SDRC.

The SDICDSI and SDRC will ensure that every board member and every employee completes the standard conflict of interest statement developed by DDS.

Every new member of the Board of Directors and the Executive Director will complete and file the DDS conflict of interest statement with the Board of Directors within 30 days of being selected, appointed, or elected. Every current and new employee will complete and file the DDS conflict of interest statement with the SDRC Human Resources Department. Every new employee will complete and file the DDS conflict of interest statement within 30 days of assuming the position. Every member of the Board of Directors and SDRC employees will complete and file the DDS conflict of interest statement by August 1 of each year.

Every member of the Board of Directors and every SDRC employee will complete and file a subsequent DDS conflict of interest statement upon any change in status that creates a potential or present conflict of interest. For the purposes of this policy, a change in status includes, but is not limited to, a change in financial interests, legal commitment, SDICDSI or SDRC position or duties, or both, or outside position or duties, or both, whether compensated or not.

The Board of Directors shall submit a copy of the completed DDS conflict of interest statements of the members of the Board of Directors and executive director to DDS within 10 days of receipt of the statements.

The executive director shall review the DDS conflict of interest statement of each SDRC employee within 10 days of receipt of the statement. If a potential or present conflict of interest is identified for an employee that cannot be eliminated, the SDRC will, within 30 days of receipt of the statement, submit to DDS a copy of the conflict of interest statement and a plan that proposes mitigation measures, including timeframes and actions the SDRC or the employee, or both, will take to mitigate the conflict of interest.

The Board of Directors will review the conflict of interest statement of the executive director and each member of the Board of Directors to ensure that no conflicts of interest exist. If a present or potential conflict of interest is identified for the executive director or a member of the Board of Directors that cannot be eliminated, the Board of Directors will, within 30 days of receipt of the statement, submit to DDS and the State Council on Developmental Disabilities a copy of the conflict of interest statement and a plan that proposes mitigation measures, including timeframes and actions the Board of Directors or the individual, or both, will take to mitigate the conflict of interest.

SDRC employees are prohibited from accepting a gift or gifts from a regional center service provider, a consumer of SDRC services, or a family member of a consumer of SDRC services valued over fifteen dollars (\$15) per year.

SDRC Senior Staff are prohibited from hiring any family member (as defined by Title 17 CCR section 54505) as an employee at SDRC or any ancillary foundation or organization. SDRC Senior Staff includes the Executive Director, the Associate Executive Director, all Department Directors, and all Associate Department Directors.

This SDICDSI and SDRC conflict of interest policy shall be posted on the SDRC website.

Approved by the SDICDSI Board of Directors on ~~July 12, 2011~~.



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MEMORANDUM

DATE: August 5, 2025
TO: Board of Directors
FROM: Mark Klaus, Executive Director
RE: Executive Director's Report

San Diego Regional Center Clients Served:

During July, 748 cases were opened through intake at the San Diego Regional Center (SDRC). There were 525 (70%) cases opened in the Early Start Program for infants and toddlers younger than three years of age. During the month, 94 cases were reactivated, 121 cases were inactivated, and 669 cases were closed. At the end of July, the total regional center caseload was 46,318.

Employees of Distinction:

Chessa Burke, Christina Longoria, and Caitlynn Peregoy in Unit 47 recently collaborated on and created a new IPP guide for Service Coordinators for the Standardized IPP. The IPP guide was recently shared with other regional centers in a statewide workgroup, and the feedback SDRC received was resoundingly positive. The SDRC Standardized IPP guide is now being referenced and adapted for use statewide at many regional centers for the Self-Determination Program (SDP). This has contributed to SDRC's position as a statewide leader in SDP. The Department of Developmental Services (DDS) and other regional centers regularly consult with SDRC for guidance on the SDP.

Chessa, Christina, and Caitlynn are long-standing members of the SDP team, having been involved in SDP even before joining the dedicated SDP unit. They have demonstrated that they are experts in the SDP. They regularly offer training and support to both service coordinators and program managers in other units. They are true leaders in the agency in supporting the success of the Self-Determination Program. They each carry legally complex cases and support people on their caseload who have complex needs.

Kim Hosburg, Human Resources, has been an SDRC employee since October 2001. Prior to joining the Human Resources team, Kim worked in the Client Services Department providing support to the directors and the manager responsible for interviewing service coordinators. Kim is being recognized for the phenomenal job organizing the first all staff annual picnic held this year at the San Diego Zoo. It was a big success despite some initial glitches that Kim addressed with both poise and professionalism. There were more than 1,200 attendees and the feedback from attendees was overwhelmingly positive. The change of venue from the picnic held for many years in Mission Bay was a success due to Kim's dedication and commitment.

Executive Team Reports:

Attached, you will find Program Summary reports from SDRC's Executive Leadership Team Members. I am hopeful that you find these reports and updates informative.

Imperial County SELPA Community Advisory Committee Award:

On June 18, 2025, the Imperial County SELPA Community Advisory Committee announced the honorees that will be recognized at the SELPA Executive Board meeting on Wednesday, September 17, 2025. The awardees are recognized for their dedication, commitment, and service to addressing the needs of students with disabilities throughout Imperial County.

Joab Gonzalez, Assistant Director of Client Services at the San Diego Regional Center, has been selected for the Community Partnership Excellence award for his outstanding collaboration and commitment to our community and supporting the needs of individuals with disabilities. As a trusted community partner, Joab has strengthened connections between the San Diego Regional Center and local agencies, school districts, and families across Imperial Valley.

Joab consistently supports key community events such as the Annual Autism Fair, Imperial Valley Parent Conference, Imperial Valley Children's Fair, and the SELPA/IVC Transition Fair. He advocates for students with disabilities and ensures families are connected to essential services. His professionalism, kindness, and dedication foster inclusive partnerships that make a lasting impact. Joab often exceeds expectations in linking individuals and families with resources and services. We are grateful for Joab's leadership and continued support in building a more inclusive and connected community for all.

Master Plan for Developmental Services:

On June 27, 2025, the Master Plan Committee Members received an invitation to participate in two full-day meetings being held by the Department of Developmental Services on August 6 and December 11, 2025. Both meetings are for committee members only. As part of the Plan, the Administration made a commitment to review progress on its recommendations at least twice a year over the next decade.

DDS noted that everyone in the community has a role to play to help carry out the Plan's recommendations. committee members and the public will soon be able to view and contribute to an editable *Master Plan Actions Document*, which will be available online. This document will include all 167 recommendations from the Plan. Community members will be encouraged to provide updates and comments directly within the document at any time. The document will then be:

- Reviewed by Committee Members and the Department during the invitation-only meetings on August 6 and December 11, 2025.
- Updated and posted online after each meeting for additional public input.
- Used after the December meeting as the basis for the Department's annual report to the Legislature regarding the Plan's recommendations. This reporting is outlined in Welfare and Institutions Code [section 4581](#).

Assembly District 79 Woman of the Year:

Cali Williams was recognized as the Disability Rights Advocate of the Year by Assemblymember Dr LaShae Sharp Collins. Cali and her family attended the awards presentation on July 12th. Congratulations and thank you to Cali for her exceptional advocacy and efforts! A few photos are included at the end of my report.

Conflict of Interest Reporting:

As David Hadacek mentioned during his presentation on June 10, 2025, all Board members and the Executive Director are required by the Department of Developmental Services (DDS) to complete a conflict-of-interest reporting form annually and to submit to DDS no later than August 15. I have completed my form and noted, as I have since I assumed the position of Executive Director, that my daughter is employed by one of our vendors (Home of Guiding Hands). A Conflict Resolution Plan has been submitted to DDS as required.

Federal Update:

On July 3, 2025, the House passed the same version of the budget reconciliation bill passed by the Senate on July 1, 2025. On July 4, President Trump signed the legislation into law (Public Law No: 119-21). The U.S. Senate passed a reconciliation bill on a 50-50 vote with Vice President Vance breaking the tie. The House passed the bill by a vote of 218 to 214. I've attached a summary by the Arc of the United States that does an excellent job of summarizing many of the provisions related to Medicaid, SNAP, Private School Vouchers, ABLE Act, and a few additional provisions.

Family Resource Fair:

SDRC's Family Resource Fair will be held on October 4, 2025, at the San Diego Convention Center. For additional information and to register to attend, please visit [SDRC- CON](#). The flyer is attached for your information.

ARCA Academy:

The next ARCA Academy will be held on November 14 – 15, 2025, in Sacramento at Alta Regional Center. I have attached the Save the Date for your information.

Jobtoberfest Job Fair:

In conjunction with National Disability Employment Awareness Month in October, the San Diego Committee on Employment of People with Disabilities will be presenting their 26th Annual Jobtoberfest Job Fair on Wednesday, October 26, 2025, at The Balboa Park Club from 9:00 a.m. to 2:00 p.m. Jobtoberfest is the *largest* job fair for people with disabilities in San Diego. It is anticipated that **1,500** job seekers will attend. SDRC is proud to sponsor this event to support creating job opportunities for individuals with developmental disabilities.

Housing Symposium:

On October 20, 2025, at Sharp Prebys Education and Innovation Center, SDRC will be hosting a community housing symposium in partnership with many of our community partners. More information will be coming shortly.

ARCA Annual Report:

Attached is the ARCA Annual Report which was shared with the ARCA Board of Directors at their Annual Meeting on June 27, 2025.

SANDIS Conference:

SDRC will be hosting a SANDIS (San Diego Information System) conference for all regional centers and DDS IT staff on November 4 and 5, 2025 at the Bahia on Mission Bay. Based on previous conferences we have hosted, we are expecting 60 to 70 attendees.

Trailer Bill Language Affecting Regional Centers:

A summary of trailer bill language affecting all regional centers provided by DDS is attached.

National Leadership Consortium:

San Diego Regional Center will be hosting the Western States National Leadership Consortium on Developmental Disabilities on November 9 through 14, 2025. The National Leadership Consortium on Developmental Disabilities is a partnership of 19 national developmental disabilities organizations. The Consortium offers intensive week-long leadership institutes designed to meet the specific needs of disability organizations. The goal of the National Leadership Consortium is to assure the quality and commitment of the next generation of leaders for government and nonprofit organizations serving people with developmental

disabilities. Drawing on the experience of its co-founders, who lead two of the largest national disability associations, the Leadership Consortium is dedicated to developing a corps of quality leaders and promoting sound, values-based leadership practices.

Employment Symposium:

On December 2, 2025, SDRC will be hosting an Employment Symposium at Sharp Prebys Education and Innovation Center. More information will be coming shortly.

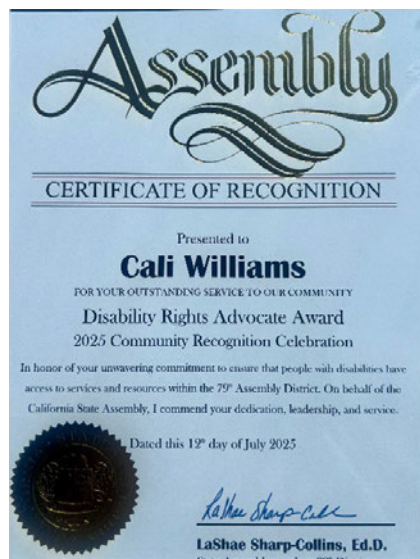
Updated Organizational Report:

Attached you will find a copy of SDRC's Organizational Chart which was updated on July 8, 2025.

If you have any questions regarding my report or anything else included in the Board Packet, please do not hesitate to contact me at your convenience.

Thank you for your time, your commitment, and for all you do for SDRC.

Mark



The SDRC Organization

San Diego-Imperial Counties Developmental Service, Inc.
SDICDSI





Final Budget Reconciliation Provisions

July 11, 2025

On July 3, the House passed the same version of the budget reconciliation bill passed by the Senate on July 1. On July 4, President Trump signed the legislation into law ([Public Law No: 119-21](#)).

The U.S. Senate passed a reconciliation bill on a [50-50](#) vote with Vice President Vance breaking the tie. Republicans who voted against the bill were Senators Collins (ME), Tillis (NC), and Paul (KY). The House passed the bill by a vote of [218 – 214](#) with Republican Representatives Massie (KY) and Fitzpatrick (PA) voting no along with all Democrats.

Following is a summary of provisions related to Medicaid, SNAP, Private School Vouchers, ABLE Act, and a few additional provisions.

Medicaid

According to the nonpartisan Congressional Budget Office (CBO), the Senate-passed bill cuts Medicaid by \$1 trillion, approximately \$200 billion more than the original House bill. Taking into account that the bill does not extend the ACA enhanced premium tax credits, CBO estimates this bill will lead to nearly 17 million losing health care.

CBO estimates the proposed Medicaid cuts would cost states \$200 billion over ten years due to reduced federal funding and restrictions on how states can finance their Medicaid programs. The federal cuts would force state changes including “reducing provider payment rates, reducing the scope or amount of optional services, and reducing Medicaid enrollment.” Of the 7.8 million people CBO expects to lose Medicaid and become uninsured, 2 million would lose coverage because of state responses to increased financial pressure.

Large-scale coverage losses would add other costs to states that CBO’s estimates don’t reflect, including increases in uncompensated care, a sicker workforce, job loss in the health care sector, and loss of tax revenue. These impacts would further burden state budgets, which are already under strain.

Medicaid funds 40% of births nationwide. Cuts in the final bill can lead to more than 140 labor and delivery units in rural areas closing. Losing access to this critical funding can increase the maternal death rate and lead to significant losses in early detection and protection for pregnant people and babies.

CONTACT US FOR MORE INFORMATION

(800)433.5255 | 2000 Pennsylvania Ave. | Washington, DC | Musheno@TheArc.org



Work Requirements

- The mandatory work requirements are [designed to terminate health care](#) for 5.2 million people. The final bill signed into law eliminates exemptions for parents of kids over 14 years of age (instead of all parents) – adding up to 300,000 more people harmed by work requirements.
- New applicants for Medicaid must meet work requirements at the time of application, and states can look back up to 3 months prior.
- The Secretary of Health and Human Services can exempt states from compliance until as late as 2028 if the state is demonstrating a “good faith effort”, leaving work requirements programs largely at the discretion of the Secretary.
- States must require “able-bodied” adults aged 19–64 to work or do approved activities for at least 80 hours a month to qualify for Medicaid. Despite claims to the contrary, many individuals harmed by work requirements will be people with disabilities and older adults between the ages of 50 and 65. Many will be people who are already working, including direct support professionals and home care workers, or people caregiving for people with disabilities.
- Exemptions include individuals who are “medically frail” or otherwise have special medical needs (as defined by the Secretary), including individuals with intellectual or developmental disabilities. However, we know that [carve-outs don't work](#) and a large portion of the expansion population are people with disabilities, and two-thirds are already working.
- The existence of a provision exempting individuals during months in which they are served in an intermediate care facility for individuals with intellectual disabilities demonstrates little reason for confidence that people with IDD are fully carved out.
- [A recent analysis](#) of the enrollees in the Medicaid expansion affected by the new work requirements demonstrates that the vast majority of working-age adults (aged 18-64) are either working, caring for family members, or exempt because of health issues. The remaining Medicaid enrollees classified as “able-bodied” represent **only 15.8% of the total nonworking** Medicaid population ages 18-64. Nearly 80% of these non working adults are extremely poor women on the older end of their work life who have no income of their own and live in very poor households. Most have less than a high school education and have left the workforce to take care of family members, such as

FOR PEOPLE WITH INTELLECTUAL AND DEVELOPMENTAL DISABILITY

(800)433.5255 | 2000 Pennsylvania Ave. | Washington, DC | Musheno@TheArc.org



elderly parents, or adult children, or spouses with disabilities, or a combination of the three.

- Specifies seasonal workers meet requirements if average monthly income meets specified standard.
- Requires states to use data matching “where possible” to verify whether an individual meets the requirement or qualifies for an exemption.
- The final bill increases funding to states for FY 2026 to \$200 million and HHS implementation funding for FY 2026 to \$200 million.
- This provision will now take effect sooner (December 31, 2026 instead of 2029) or earlier at state option, increasing coverage losses and adding stress to state systems because of the rushed start. The bill mandates guidance for states by December 31, 2025.
- The bill eliminates the discretion of future administrations to waive work requirements for various populations.

Effective Date: December 31, 2026 or earlier at the state option

Retroactive coverage

- States currently have to provide coverage for qualified expenses up to 90 days prior to application. This will be limited to one month for expansion enrollees and two months for traditional enrollees.

Effective Date: January 1, 2027

Cost sharing

- The bill allows states to apply [cost-sharing](#) to some Medicaid expansion enrollees.
- Eliminates enrollment fees or premiums for expansion adults.
- Requires states to impose cost sharing of up to \$35 per service on expansion adults with incomes 100-138% FPL; explicitly exempts primary care, mental health, and substance use disorder services from cost sharing, maintains existing exemptions of certain services from cost sharing, and limits cost sharing for prescription drugs to nominal amounts.
- Maintains the 5% of family income cap on out-of-pocket costs.
- The final bill exempts services provided by federally qualified health centers, behavioral health clinics, and rural health clinics.
- It provides \$15 million for implementation funding for FY 2026.

Effective Date: October 1, 2028

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Eligibility determinations

- Requires states to conduct costly eligibility redeterminations at least every 6 months for Medicaid expansion adults. People [lose coverage](#) when they miss notifications, steps in the process, or just don't know that they are up for review.
- The final bill added a requirement that the Secretary must issue guidance on determinations within 180 days of enactment.
- The final bill provides \$75 million in implementation funding for FY 2026.

Effective Date: For renewals scheduled on or after December 31, 2026

Immigrants Eligibility

- The bill restricts the definition of qualified immigrants for purposes of Medicaid or CHIP eligibility to lawful permanent residents (LPRs), certain Cuban and Haitian immigrants, citizens of the Freely Associated States (COFA migrants) lawfully residing in the US, and lawfully residing children and pregnant adults in states that cover them under the ICHIA option which allows states to provide coverage to any children and/or pregnant women that are in a *legal* status (unless specifically excluded, such as DACA grantees). Per KFF data, thirty-eight states currently do this for children, and thirty-two for pregnant women.
- The final bill provides \$15 million in implementation funding for FY 2026.

Effective Date: October 1, 2026

Eligibility and Enrollment Final Rule

- Prohibits the Secretary from implementing, administering, or enforcing nearly all provisions in both rules until October 1, 2034.
- These [two Rules](#) finalized during the previous administration collectively reduce barriers to enrollment and modernize renewal policies in the Medicaid, CHIP program, and for individuals dually eligible for Medicaid and Medicare.

Effective Date Upon Enactment

Provider taxes

- Prohibits states from establishing any new [provider taxes](#) or from increasing the rates of existing taxes. This is an effective cut year over year. This does not allow for states to modify their provider taxes to

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best address their state's needs, nor does it keep up with inflation. This cost shift to states over time will mean that states may need to restrict eligibility, cut provider payments, or reduce benefits to maintain their programs.

- Revises the conditions under which states may receive a waiver of the requirement that taxes be broad-based and uniform such that some currently permissible arrangements taxes, such as those on managed care plans, will not be permissible in future years. These changes to the currently allowed methods that states use to meet their match will affect their ability to finance the program. Every state uses one or more provider taxes except Alaska which doesn't have them. Reducing what is allowable will force states to make up the difference in other ways including cutting optional eligibility and services.
- Provision overlaps with a [proposed rule](#) released May 12, 2025.
- The final bill proposed even greater restrictions on expansion states by reducing the safer harbor limit starting in 2028 from 6% by 0.5% annually until it reaches a 3.5% limit in 2032.
- The new limit applies to taxes on all providers except nursing facilities and intermediate care facilities. New limit also applies to local government taxes in expansion states.
- The final bill added a temporary rural health transformation program that will provide \$50 billion in grants to states between fiscal years 2026 and 2030, to be used for payments to rural health care providers and other purposes.
- Provides \$20 million in implementation funding for FY 2026. The Center for Medicare and Medicaid Services (CMS) are given tremendous discretion on how to implement these provisions.

State Directed Payments

- Directs HHS to revise [state directed payment](#) regulations to cap the total payment rate for inpatient hospital and nursing facility services at 100% of the total published Medicare payment rate for states that have adopted the Medicaid expansion and at 110% of the total published Medicare payment rate for states that have not adopted the expansion.
- Grandfathers state directed payments approved prior to the legislation's enactment; for states that newly adopt the expansion after enactment, the cap at 100% of the Medicare payment rate applies at the time coverage is implemented even for payments that had prior approval. For grandfathered payments, reduces payments by 10 percentage points each year (starting January 1, 2028) until they



reach the allowable Medicare-related payment limit.

Effective Date: Upon enactment

Home Equity

- Most Medicaid enrollees who qualify for Medicaid because they need long-term care (LTC) are subject to limits on their home equity. In 2025, federal rules specified that states' limits on home equity must be between \$730,000 and \$1,097,000, and those amounts are updated each year for inflation.
- The bill reduces the maximum home equity limits to \$1,000,000 regardless of inflation, although it allows states to apply different requirements for homes that are located on farms.

Effective Date: January 1, 2028

New HCBS Provision

- States are required to cover nursing facility care under Medicaid, but nearly all home care (HCBS) is optional. Nearly all states provide home care through "1915(c) waivers," which limit services to people who require an institutional level of care.
- Allows states to establish 1915(c) HCBS waivers for people who do not need an institutional level of care. States would need to establish needs-based criteria for HCBS eligibility, subject to federal approval.
- Requires states to establish more stringent needs based criteria for individuals requiring institutional level of care (hospital, nursing facility or intermediate care facility for individuals with developmental disabilities compared to the HCBS eligibility criteria.
- The final bill Includes requirements for states' waiver submissions that include a demonstration that the new waiver will not increase the average amount of time that people who need an institutional level of care will wait for services.
- Includes \$50 million in FY 2026 and \$100 million in FY 2027 for implementation.

Effective Date: New waivers may not be approved until July 1, 2028

Rural Health

- Establishes a rural health transformation program that will provide \$50 billion in grants to states between fiscal years 2026 and 2030, to

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be used for payments to rural health care providers and other purposes.

- Uses of funds include promoting care interventions, paying for health care services, expanding the rural health workforce, and providing technical or operational assistance aimed at system transformation.

Effective Date: Upon enactment with funding available in FY 2026

For more health provisions in the final reconciliation bill, see the [Kaiser Family Foundation \(KFF\) tracker](#).

Supplemental Nutrition Assistance Program

The final bill cuts nearly \$200 billion from the program, shifting costs to states, and incorporating harsher work reporting requirements.

- The reconciliation bill would dramatically raise costs and reduce food assistance for millions of people by cutting federal funding for the Supplemental Nutrition Assistance Program (SNAP) by [\\$186 billion through 2034, according to the Congressional Budget Office \(CBO\), about 20 percent](#) — the largest cut to SNAP in history. These cuts would increase poverty, food insecurity, and hunger, including among children.
- Cuts to SNAP in the final reconciliation bill will affect all of the more than 40 million people who receive basic food assistance through SNAP, including some 16 million children, 8 million seniors, and 4 million non-elderly adults with disabilities, all of whom would be affected by the cuts in the bill.
- **Freezing Future Benefit Improvements through the Thrifty Food Plan:** The Thrifty Food Plan is an estimate of the price of a low-cost, healthy diet that the USDA uses to set SNAP benefit amounts. The final bill requires all future updates to the Thrifty Food Plan (TFP) to be cost-neutral and makes it harder for the USDA to improve SNAP benefits. According to the CBO, this would effectively erode benefits over time and cut SNAP spending by about \$37 billion over the next 10 years.
- **Shifting Costs to States:** The final bill includes major structural changes that would cut billions in federal funding for most states' basic food benefits and then require those states to backfill for the federal cut. The bill reduces the federal cost share of administering SNAP from 50 percent to 25 percent beginning FY 2027, effectively increasing state cost sharing requirements by 25 percent.

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- In addition to covering more of the administrative cost of the program, for the first time ever, states will be required to pay for a percentage of SNAP food benefits' cost. If a state can't make up for these massive federal cuts with tax increases or spending cuts elsewhere in its budget, it would have to cut its SNAP program (such as by restricting eligibility or making it harder for people to enroll) or it could *opt out of the program altogether*, terminating food assistance entirely in the state.
- In contrast to the original House version of the bill, the final bill allows some states to avoid footing the bill for SNAP benefits if they get their payment error rates below 6 percent by fiscal year 2028. However, this 0 percent match is not a guarantee — even a slight increase in error rates could trigger new financial obligations. States with higher error rates would be required to pay more in SNAP costs. This will significantly increase states' financial responsibility and alter the current federal-state structure, where the federal government pays 100 percent of SNAP food benefits.
 - In an effort to appease senators from Alaska, the final bill will delay a provision shifting SNAP costs to states, but only for states with sufficiently high "payment error rates." This will likely apply to **Alaska, DC, Florida, Georgia, Maryland, Massachusetts, New Jersey, New Mexico, New York, and Oregon**. This will create a perverse incentive for states to pursue more errors to delay cuts.

State data can be found [here](#).

- **Work Requirements:** More than 5 million people — about 1 in 8 SNAP participants — including 800,000 children and over half a million adults who are aged 65 or older or have a disability, live in a household that would be at risk of losing at least some of their food assistance because someone in their household is subject to the significant expansion of SNAP's work requirement under the Senate proposal.
- Under current SNAP rules, most non-elderly, non-disabled adults without children in their homes can't receive benefits for more than three months out of every three years if they don't document they are working at least 20 hours per week or prove they qualify for an exemption. The final bill expands this work requirement to older adults aged 55-64 and to parents whose youngest child is at least 14 years old, while also significantly limiting waivers for areas with poor economic conditions. (See state data on the number of people at risk [here](#).)



- CBO has indicated that more than 2 million people in total would be cut from SNAP under the provision in a typical month, including 1.1 million people who live where jobs are scarce; 900,000 adults aged 55-64; 270,000 veterans, people experiencing homelessness, and former foster youth; and hundreds of thousands of parents of children. The CBO estimates that expanding the work requirement would cut SNAP by about \$69 billion through 2034.

Creation of a federal school voucher program

- **Creates a new permanent, unlimited tax credit for private school vouchers:** The final bill removed the \$4 billion volume cap on the total amount of donation.
- **Limits the amount a donor can donate:** The text now allows any individual to give cash donations to scholarship granting organizations (SGOs) that provide scholarships to students to attend private schools for a dollar-for-dollar tax credit worth \$1,700 (rather than 10% of adjusted gross income originally).
- **Provides broad authority for the Secretary of Treasury to regulate over the program:** Gives the Secretary of Treasury regulatory authority over the entire program, including explicit authority to regulate SGOs and opening the door to regulate over private schools.
- **Creates a state “opt in” and approval of scholarship granting organizations:** States must “opt in” each year to the school voucher program and provide a list of SGOs that can only administer school vouchers within their state.
- Since the money flows to an SGO before going to a private school, it is not considered federal money. This means the schools do not need to abide by the same civil rights laws (including IDEA, Section 504, and the ADA) as public and charter schools.

Effective for taxable years after Dec 31, 2026.

Small Improvements: ABLE Accounts, Child Tax Credit

- **ABLE Accounts:** The final bill extends three small improvements to ABLE accounts that were set to expire at the end of 2025. These include increasing contribution limits, extending and enhancing the ‘Saver’s credit’ allowed for ABLE contributions, and allowing the rollover of savings from qualified tuition programs into an ABLE account.
- **Child Tax Credit:** The bill increases the child tax credit by \$200 for qualifying children under 17. This amount is adjusted for inflation after

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2025. Eligible parents or guardians will see this reflected in their tax returns next year. However, significant changes have been made to how families can access the credit. For the first time ever, children and at least one parent or guardian must have a Social Security Number in order to qualify for the child tax credit. This new requirement could exclude many families with mixed immigration status. Additionally, some families earn too little to owe income taxes and may only qualify for a partial Child Tax Credit, receiving less than the full amount. As a result, nearly 17 million low-income children may not receive the full benefit.

With the exception of some small improvements, taken together, these actions will result in people losing health care coverage, states being limited in how they are able to finance their state match for Medicaid, and children and families losing food assistance. An estimated 300 hospitals will close. Public schools serving the majority of students with disabilities will face significant budget constraints as money is moved to private schools. This level of cuts to Medicaid will require states to make difficult choices about their programs. With home and community-based services being “optional” under the Medicaid program, they are likely to look at cutting these optional services.

Please use [The Arc's Action Alert](#) to express your disappointment with members who voted for this bill and gratitude to those who voted against it.

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State of California—Health and Human Services Agency
Department of Developmental Services
1215 O Street, Sacramento, CA 95814
www.dds.ca.gov



July 18, 2025

D-2025-Legislation-002

TO: REGIONAL CENTER EXECUTIVE DIRECTORS
REGIONAL CENTER BOARD PRESIDENTS

SUBJECT: 2025 TRAILER BILL LANGUAGE AFFECTING REGIONAL CENTERS

The purpose of this directive is to provide a summary of the 2025 Developmental Services Budget Trailer Bill, [AB 143 \(Chapter 12, Statutes of 2025\)](#) and the still-pending 2025 Social Services Trailer Bill, SB 119, which affects regional centers, state operated services and the developmental disabilities services system. The changes made by these bills became effective with their enactment, unless otherwise specified by the statute. While this letter provides a high-level summary, a complete and thorough review of the bills by regional centers is imperative for statutory compliance. Requirements and due dates for regional centers are included in this directive, to avoid the need for directives on individual topics. Below is a list of areas affected by, and/or new requirements resulting from these bills, and the sections of each bill where relevant statutory changes can be found:

- [Implicit Bias Training](#)
- [Rate Reform Hold Harmless Date & Quality Incentive Program Eligibility Requirements](#)
- [Eligibility for the Quality Incentive Program Rate Component](#)
- [Master Plan for Developmental Services](#)
- [Health and Safety Waiver Application Assistance](#)
- [Cost Effective Definition](#)
- [Self-Determination Program](#)
- [Tailored Day Program](#)
- [Parental Fee Program Repeal](#)
- [Employment Services](#)
- [Rates Updates](#)
- [Mandated Reporter Curriculum](#)

Implicit Bias Training

AB 143 Section 1: Welfare and Institutions Code Section 4511.1 was amended to make regional center implicit bias training subject to an appropriation by the Legislature. However, it is the intent of the Legislature for regional centers to continue to offer implicit bias training to the extent their resources allow.

Implementation: *The requirement for implicit bias training now is subject to an appropriation by the Legislature. The 2025 Budget Act includes no dedicated funding for the training. Therefore, regional centers are not required to provide this training until the Legislature*

appropriates funds in the future. Regional centers may offer the training if their resources allow.

Rate Reform Hold Harmless Date & Quality Incentive Program Eligibility Requirements

AB 143 Section 2: Welfare and Institutions Code Section 4519.10 was amended to change the expiration date of the hold harmless policy for providers whose rates exceed the rate model recommendations, from June 30, 2026, to February 28, 2026.

Implementation: Effective March 1, 2026, the rates for providers previously subject to the hold harmless provision will be adjusted to 100 percent of the posted rate model rate for those who earned the quality incentive payment, and 90 percent for all other providers. This adjustment will align provider rates within the same service category and region. The Department of Developmental Services (Department) issued [\(D-2025-Rate Reform-006\)](#) on July 2, 2025. Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect this change.

Eligibility for the Quality Incentive Program Rate Component

AB 143 Section 2: Welfare and Institutions Code Section 4519.10 was amended to require that beginning in the 2026–27 fiscal year, providers must comply with electronic visit verification, home- and community-based services rules, and applicable annual fiscal review and audit requirements to be eligible for the quality incentive program. This program is the opportunity for providers included within rate reform to earn the last ten percent of their applicable rate model.

Implementation: The Department will issue guidance to regional centers. Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect this change.

Master Plan for Developmental Services

AB 143 Sections 3 and 4: Welfare and Institutions Code Section 4580.5 was added to establish the Legislature’s intent for the Master Plan for Developmental Services, including receiving information on next steps and ongoing updates on implementation progress. Also, Welfare and Institutions Code Section 4581 was amended to establish meeting and reporting requirements regarding the implementation of any recommendations from the Master Plan for Developmental Services.

Implementation: There is no immediate impact on regional centers. The Master Plan Committee will meet twice per year to review the status of Master Plan recommendations.

Health and Safety Waiver Application Assistance

AB 143 Section 6: Welfare and Institutions Code Section 4620.4 was amended to make regional center health and safety waiver application assistance subject to an appropriation by the Legislature.

Implementation: The 2025 Budget Act includes no dedicated funding for the specified assistance. The Department issued [guidance](#) to regional centers on June 18, 2025

providing instructions for when and how to submit Health or Safety Waiver requests to the Department after July 1, 2025. Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect these changes.

Cost Effective Definition

AB 143 Section 7: Welfare and Institutions Code Section 4648 was amended to require the Department, with community input, to issue a written directive defining the term “cost effective” for all programs, including, but not limited to, the Self-Determination Program, no later than August 1, 2026.

***Implementation:** The Department will work with community partners, including regional centers, to define the term “cost effective” and will issue guidance to regional centers. After the definitions are established, regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect these changes.*

Self-Determination Program

AB 143 Section 8: Welfare and Institutions Code Section 4685.8 was amended to require the Department to work with community partners, including regional centers, to develop statewide standardized processes, procedures, and timelines related to enrollment, individual budget development, spending plans, financial management services, services and access to transition supports.

Specifically, this bill:

- Requires the Department, by March 1, 2027, with community input, to develop statewide standardized processes and procedures and timelines to be used by all regional centers. These standardized processes and procedures will cover enrollment, individual budgets, spending plans, financial management services, and access to transition supports.
- Requires initial individual budgets to be the total amount of the most recent available 12 months of purchase of service authorizations plus services authorized by the Individual Program Plan (IPP) team but not currently provided in a purchase of service authorization, minus services paid for by the regional center outside of the self-determination program and minus one-time expenses.
- Requires the IPP team to discuss unmet needs for participants with no or low purchases of services, which historically has been identified as services less than \$2,000 per year.
- Allows participants to transfer between service codes and budget categories with approval from the regional center or the participant’s IPP team.
- Requires regional centers to provide timely authorization to the participant’s financial management services.
- Requires regional centers to certify spending plans to verify that goods and services satisfy the following criteria:
 - Address the individual’s desired outcomes as identified in the IPP.
 - Are not available from generic services, as defined by the Department.
 - Are eligible for federal financial participation.

Implementation: The Department will issue guidance to regional centers on these topics. Regional centers must and should only update policies, procedures, publications, and other materials as needed to reflect these changes after receiving the Department's guidance.

Tailored Day Services

AB 143 Section 9: Welfare and Institutions Code Section 4688.21 was amended to require the Department, by July 1, 2025, to set the hourly rate for tailored day services and publish it on its website.

Implementation: The Department already has posted the tailored day service [rates](#) on its website.

Parental Fee Program Repeal

AB/SB 143 Sections 5 and 10: Welfare and Institutions Code Section 4784 was repealed. This eliminated the parental fee program after June 30, 2025. A conforming change also was made to Welfare and Institutions Code Section 4620.3.

Implementation: As of July 1, 2025, this program is repealed. The Department issued [D-2025-Case Management-10](#) on July 14, 2025, ending the program and describing remaining collection activities and contact information for any questions.

Employment Services

AB 143 Section 11: Welfare and Institutions Code Section 4851 was amended to correct the name of the Commission on Accreditation of Rehabilitation Facilities, and to allow for group supported employment ratios of one direct service professional to two through eight individuals receiving employment services. This change is consistent with the funded rate model for group supported employment.

Implementation: Effective July 1, 2025, the Supported Employment – Group (SEP) ratios align with the already-published [rate models](#). Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed. The Department will issue instructions for new SEP group submissions and reporting any changes to group ratios.

Rates Updates—Employment Services

AB 143 Section 12: Welfare and Institutions Code Section 4857.1 was amended to eliminate the requirement that regional centers purchase habilitation services only from accredited community nonprofit agency providers.

Implementation: Effective July 1, 2025, the requirement for employment providers to have nonprofit status is removed. Regional centers shall work with new or existing for-profit vendors that currently are providing employment services under a different service code to become vendored for supported employment under service codes 950 or 952.

AB143 Sections 13 and 15: Welfare and Institutions Code Section 4860 was amended to require the Department to establish and publish the hourly rate for supported employment and group services on its website. A conforming change was made to Welfare and Institutions Code Section 4870.

Implementation: There is no immediate impact on regional centers. The Department already has posted supported employment and group services [rates](#) on its website.

AB 143 Section 14: Welfare and Institutions Code Section 4861 was amended to specify that any new work activity program will receive the rate posted on the Department's website.

Implementation: There is no immediate impact on regional centers. The Department already has posted work activity program [rates](#) on its website.

Mandated Reporter Curriculum

SB 119 Section 34: Welfare and Institutions Code Section 18950.1 was added to require the use of a standardized curriculum for child welfare mandated reporters. Mandated reporters are strongly encouraged to complete the training using the curriculum within the first three months of employment, or no later than March 1, 2030.

Implementation: According to their contracts with the Department, regional centers have a Zero Tolerance Policy that requires regional centers, its vendors and long-term health care facilities and their respective employees be informed and knowledgeable on reporting abuse. The Department of Social Services is required to develop a standardized curriculum for mandated reporters by July 1, 2027. This training shall be available on the internet. After that date, the Department intends to require regional centers to train all employees who are mandated reporters using the new standardized curriculum.

Sincerely,

Original Signed by:

PETE CERVINKA
Director

cc: Regional Center Administrators
Regional Center Directors of Consumer Services
Regional Center Community Services Directors
Association of Regional Center Agencies



San Diego Regional Center

3rd Annual Vendor & Family Resource Fair

Open to Everyone!

Families, self-advocates, and community members — come explore services and supports for people with intellectual disabilities!

San Diego Convention Center
October 4, 2025, 9 am – 3:30 pm

300+ Exhibitors. Meet service providers, community partners, and inspiring self-advocate microenterprises.

8 Dynamic Breakout Sessions.

Engage in focused conversations, learn, and connect with experts.

Plan Ahead. Be sure to review the agenda to make the most of your day!



Free Parking for the First 600 Attendees.

VISIT the SDRC Resource Row!

Connect with our experts on:

- Services by age group
- HCBS Waiver
- Supported Decision Making
- Self-Determination
- Participant-Directed Services
- Emergency Management
- Residential Options



SCAN the QR or
CLICK HERE to REGISTER



Any questions, speak with your Resource Coordinator



San Diego Regional Center

3rd Annual Vendor & Family Resource Fair

Agenda

- 8:30am: Registration for Attendees Begins
- 9am: Doors to Hall F Open
- 9:05am: Opening Ceremonies by our Executive Director, Mark Klaus
- 9:20am: Resource Fair Opens to the Public
 - Resource Fair is open all day from 9:20am – 3pm
- 9:30am: 1st Breakout Session Starts
- 11am: 2nd Breakout Session Starts
- 12:15pm – 1:15pm: Lunch is Served
- 3pm – 3:30pm: Closing Ceremonies





Save the Date **ARCA Academy**

November 14-15, 2025
@ Alta California Regional Center

This is a leadership development opportunity for the board members and the leadership staff of the California regional centers.

Watch for...Hotel Information, event Schedule, promotional videos, and other materials, etc.

Mark your calendar, you won't want to miss this one.

For questions, please contact Tony Anderson at tanderson@arcanet.org.



ARCA Annual Report

- an annual report that highlights ARCA's major projects and achievements –

June 27, 2025

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Refine rate reform for developmental services

1. Worked with DDS to refine the process for collection of information needed for the development of the Service Provider Directory that will inform the payment of 10% of provider rates.
2. Discussed with an LA Times reporter the challenge that service rate limitations cause related to service access.
3. Engaged in advocacy targeting the State Senate and Governor in support of AB 2423 by Assemblymember Devon Mathis (R-Visalia) related to developmental services rates and re-evaluations.
4. Worked with the Direct Support Professional (DSP) Collaborative to continue its efforts to advance the careers and wages for this workforce.
5. Discussed the impact of the establishment of the health care facility minimum wage with the Legislative Analyst's Office and highlighted the upward pressure on wages in developmental services this will exacerbate.
6. Developed a workforce policy recommendation and sponsored a bill related to long-term planning for this workforce – rate reform is a component of this policy.
7. Worked with DDS and regional center representatives to provide feedback and input on rate model implementation directives to support its rollout.
8. Met with providers from ANCOR, governmental affairs workgroup, on issues related to rate reform.
9. Medicaid Advocacy- grassroots organizing. Worked to organize regional center teams for rallies in Palm Desert, Anaheim, Rocklin, Santee, Bakersfield, Clovis, and Chico.
10. Advocated in Budget hearing testimony for the preservation of the Direct Support Professional University program.

Advocate for an equitable and sustainable regional center operations funding methodology

1. Worked with DDS staff on the identification of parameters for the Regional Center Performance Measure related to data collection in the Self-Determination Program.
2. Met with the staff of the LAO and discussed the Core Staffing Formula and the need for a focus on the service coordinators and the caseload ratios.
3. Worked with the Lanterman Coalition to establish its annual priorities, including equitable funding for all regional center service coordinators.
4. Consulted with DDS staff on the development of contract language related to generative artificial intelligence to ensure the next contract amendment is not delayed.
5. Supported discussions of ARCA's Board of Directors to establish a response to the Governor's Budget that highlights the Operations needs of regional centers to support rate model implementation.
6. Worked with the team to inform the ARCA Board and community about the status of the funding for the growth in the community system.
7. Testified in the Assembly Budget Subcommittee #2 hearing related to the need to align funding for regional centers with established goals for service delivery.
8. Advocated with DDS for recalculation of Regional Center Performance Measure incentive payments given unclear processes for data collection.
9. Shared ARCA's proposed Core Staffing Formula revision with DDS for its consideration.
10. Developed a cost analysis to identify regional center fiscal needs in response to proposed legislation.

Support the development of needed services identified by individuals served and families

1. Lobbied a variety of bills to improve community-based service access.
2. Worked with ACRC and VMRC on the DSP Collaborative as an effort to bolster the workforce so people with disabilities can access needed services.
3. Supported regional centers as they worked with DDS and contractors regarding the project to create a standard assessment tool for respite services.
4. Worked with ARCA's Board of Directors to establish an organizational priority related to the better collection of housing needs data for those served by regional centers.
5. Participated in capacity building sessions for developmental services during the NASDDDS and other national conferences.
6. Provided a presentation to the Master Plan Workgroup #3 on employment development strategies to improve service capacity.
7. Sponsored a bill regarding the administration of seizure rescue medication in licensed settings and lobbied it as it would allow people with disabilities to access a broader array of services.
8. Hosted ARCA's annual Grassroots Day for over 200 advocates to encourage support of the Direct Support Professional workforce and greater medication support for people with Epilepsy.
9. Participated in a meeting with DDS and regional center representatives on the development of a comprehensive safety net plan to guide the state's work in this area.
10. Provided testimony on prevalence of crime and abuse of adults with developmental disabilities.

Promote more efficient coordination of regional center and generic services

1. Attended the California Association of Health Plans conference and secured agreement from the Department of Health Care Services to initiate conversations about coordination of benefits between health plans and regional centers.
2. Supported the work of ARCA's Standards and Practices Committee as it developed a standard related to remote planning team and in-person meeting requirements.
3. Participated in a discussion that included state departments, statewide associations, and local representatives regarding better coordination of services for multi-agency children and youth and advocated for support for individuals regardless of service delivery system or funding source.
4. Represented ARCA on the Health and Human Services Agency's Behavioral Health Task Force to ensure conversations take into account individuals' developmental needs.
5. Organized a meeting with the Partners in Policymaking graduates and the Master Plan organizers to provide feedback from an advocate on improving the coordination of services and supports to people with disabilities and their families.
6. Met with regional center representatives along with DDS and its contractor to discuss the potential for a pilot for regional centers to provide Enhanced Care Management services and to target populations.
7. Coordinated a meeting with the association representing special education agencies to discuss opportunities for collaboration and staff cross-training.
8. Testified in support of Secretary Johnson's confirmation on behalf of ARCA and noted her commitment to better coordination of Health and Human Services benefits across departments for individuals served by multiple programs.
9. Advocated alongside community stakeholders for the ongoing Medicaid funding needed to support a variety of services individuals served and their families rely upon.
10. Participated as a speaker at a legislative briefing on Health and Human Services and Long-Term Services and Supports.

Develop meaningful metrics to support measurement and improvement of regional center effectiveness

1. Participated in the Person-Centered Advocacy (and Action) Vision Education (PAVE) discussions and feedback regarding the surveys for collecting outcome data and satisfaction data from various constituents.
2. Represented ARCA on Workgroup #4 of the Master Plan for Developmental Services that is charged with developing recommendations for regional center expectations and data collection.
3. Represented ARCA at the Disability Voices United conference and advocated for a better definition of "equity" in order to better measure progress and develop systemic improvements.
4. Met with DDS to discuss refinements to regional center audit protocols to ensure greater alignment between fiscal and programmatic monitoring.
5. Worked with the Training and Information Group on completion of a Social Recreation Training Module to support efficient and effective regional center tracking of training.
6. Worked on the development of supports for regional center trainers on setting up Instructor Led Training on the Learning Management System in preparation for the Standardized Core Competency on board trainings.
7. Testified during Senate Subcommittee #3 hearing regarding the need to identify clear metrics for expected systemic outcomes and to align funding structures with the work associated with those outcomes.
8. Met with Secretary Johnson and her staff to discuss ARCA's priorities and commitment to effective outcomes for those served by regional centers.
9. Worked in collaboration with the Lanterman Coalition members regarding implementation of the Quality Incentive Program.
10. Meeting to discuss the NCI data and the negative impact workforce shortage is having on outcomes.

**Support greater consistency and enhanced performance across all 21 regional centers balanced
with local decision-making**

1. Participated in workgroup meetings organized to develop consistent Intake Referral Forms for hospitals statewide.
2. Worked with DDS to finalize contract amendments related to communication assessments and electronic data processing to support greater consistency.
3. Participated in meetings related to the development of the uniform accounting and service coordination data systems.
4. Coordinated with DDS to improve the rollout of the standardized demographic data collection efforts beginning January 1, 2025.
5. Worked with DDS and SANDIS to develop a plan for tracking in-person meetings to assess compliance with the requirements in the Fiscal Year 2024-25 Trailer Bill Language.
6. Participated in meetings with DDS and regional center representatives on the vendorization standardization initiative.
7. Published a Power Point for the regional center directors, community services directors, and human resources professionals on the changes in employment laws that went into effect on January 1, 2025. Reviewed the summary one-page companion document.
8. Supported Board Delegates on their board competency projects with meeting attendance, research, and writing.
9. Worked with DDS staff on refinements to the standardized service coordination onboarding curriculum, which will be managed through the Regional Center Performance Measures.
10. Worked with the Standards and Practices Committee to finalize its recommendations related to training and competencies for regional center leadership.

Communicate with diverse communities and advocate alongside them for the services and supports necessary to promote good outcomes

1. Met with the Chair of the California Commission on Racial Equity. Discussed the regional center system and secured her agreement to speak at the ARCA Academy.
2. Participated in the Asian American and Pacific Islander Advanced Care Training Coalition meeting.
3. Participated in a meeting conducted by the Department of Health Care Services status of the non-Medi-Cal Gap Analysis and outreach activities to underserved communities.
4. Attended 3rd Annual Tribal Symposium to explore how California's developmental services system can best support that community.
5. Provided a keynote speech at the Bridges Conference hosted by CVRC and spoke on the topic of equity.
6. Coordinated a communication plan with a regional center and DDS on dissemination of awareness about a new Spanish-language video explaining the regional center system and its benefits.
7. Participated in the El Arc de California Spanish-speaking summit on advocacy skills/training for the Spanish-speaking community and in follow-up meetings with the group on various topics.
8. Shared resources with regional centers regarding supporting their communities in light of changing federal immigration policies.
9. Worked with the chairs of the Deaf Services Access Specialists, the Deaf Specialists Collective, and the DDS Deaf Access Group.
10. Represented regional centers at the Special Needs Network conference: Creating Opportunities Resources and Equity and resource fair.

Support the work of regional centers and their community partners to increase community inclusion for individuals with developmental disabilities

1. Lobbied against AB 2797 because it would decrease the access to landline service. This is an identified hardship for individuals with disabilities, particularly in rural regions of the state.
2. Met with CalABLE and DDS to discuss how ABLE Accounts can be a tool to support greater employment rates among people served by regional centers.
3. Participated in the Interagency Coordinating Council meetings in support of Early Start policy across the state as an appointed community member since 2001.
4. Participated in a townhall hosted by the State Council on Developmental Disabilities related to the phase-out of subminimum wage in California.
5. Gave a presentation at the Supported Life Conference supporting community inclusion strategies for people with disabilities.
6. Supported the ARCA CAC to ensure their voices were heard in an upcoming housing advocacy event.
7. Delivered the keynote speech at the Bridges Conference focused on community inclusion and person-centered approaches to supporting people with disabilities.
8. Consulted with DDS and community partners regarding enhancing supports and available flexibilities to support those impacted by recent wildfires.
9. Met with DDS to discuss enhancements to regional center data collection to better capture the housing needs of those served, which will support greater advocacy for resources in this area.
10. Organized speakers with disabilities to speak at the Medicaid rallies throughout California.

Support regional center board member development and effectiveness

1. Recorded audio and visual version of the Whistleblower and Conflict of Interest policies to improve accessibility.
2. Met with the boards of several regional centers to provide an overview of ARCA's functioning and the supports it provides to regional centers.
3. Conducted a two-day ARCA Academy training event for over 120 regional center board members from around the state to enhance their effectiveness and provide networking opportunities.
4. Met with various board members who reached out for board management technical assistance.
5. Participated in various sessions on board development and onboarding with a subset of the Board Delegates Group, including the selection of competency priorities and core subjects for board development.
6. Prepared and presented to the Board Delegates information regarding federal policy updates.
7. Developed Capitol Briefing promotional materials for Delegates and encouraged their attendance.
8. Provided counsel to many board members during Grassroots Day to support their participation in advocacy.
9. Discussed with regional center representatives on the Standards and Practices Committee opportunities to operationally define responsibilities and competencies for regional center leaders.
10. Created a survey for board skills self-assessments and feedback survey for the board delegates report.

Other Key Accomplishments

1. Explored opportunities to reduce benefit costs for ARCA staff without compromising benefit levels.
2. Met with various officials to highlight the importance of the selection of a new DDS Director committed to working collaboratively with regional centers as strategic partners.
3. Recruited and hired a Government Affairs Director with regional center experience and Spanish-language capacity to support ARCA's public-facing work
4. Represented ARCA in meetings of the Master Plan for Developmental Services.
5. Attended various regional center community events to recognize and build upon the work of the individual centers and highlight their partnership with the Association.
6. Explored platforms to increase ARCA board member management and communication.
7. Participated in both ARCA's and DDS's legislative overview of the legislative overview of the developmental services system for legislative and Administration staff members.
8. Presented on the work of regional centers and legislative advocacy strategy at various conferences.
9. Participated in the DDS Quarterly Legislative Staff Briefing on a variety of topics, including rate reform.
10. Explored opportunities to improve the efficiency of ARCA's operations, including potential lease cost savings and improvements in the accounts payable processes.
11. Participated in Office of Administrative Hearings (OAH) Advisory Committee that was created by Welfare and Institutions Code Section 4717 and is responsible for providing non-binding recommendations about mediation and hearing operations under the Lanterman Act for people with developmental disabilities in California.
12. Participated in a Legislative Analyst's Office visit to ACRC to highlight the work of regional centers.

13. Drafted multiple comment letters as part of the rulemaking process for regulations related to transitional housing and SIR reporting.
14. Participated in the Budget Advocacy and Lobbyist staff development training sessions.
15. Worked with a small workgroup of regional center staff to develop the Risk of Homelessness definition recommendation for DDS consideration.
16. Facilitated the creation of ARCA's regional center Fair Hearing/Appeals Workgroup and set a path for future meetings which will occur monthly via Zoom.
17. Met with the California Policy Center on Intellectual and Developmental Disabilities on the employment project that they are working on and discussed having regional center Employment Specialists participate in the focus group discussions employment services.
18. Worked with the Directors of Client Services to coordinate meetings with Anthem Blue Cross to address continuity of services for children exiting Early Start.
19. Researched materials related to the licensing prohibitions on administering seizure related medications and shared with the Director of Clinical Services.
20. Met with Public Counsel regarding the Intake Transfer Protocol to discuss the ways in which it supports more rapid progression of foster children through regional center intake.
21. Worked with DDS and a small workgroup regional center staff to draft the Established Risk Conditions to support more efficient Early Start intake.
22. Met with representatives of the Clinical Directors Group and Psychologists Group to update 5th Category Guidelines.
23. Conducted research regarding regional center intake of children in the Foster Care system.
24. Conducted research regarding the Public Records Act.
25. Participated in the DDS Standardized Intake Workgroup meetings held throughout the year.

26. Reviewed the Pathways Data Collection Instructions on behalf of ARCA.
27. Reviewed the Early Start Cancellations Missed Appointments Policy and provided feedback to DDS.
28. Reviewed proposed legislation and considered the possible impact on people served by regional centers to inform proposed positions.
29. Participated in launch of software for more efficient board and discipline group communication.
30. Explored more modern platforms for more efficient accounts payable methods with various vendors.
31. Extensive work on the bill file for the association. The Association officially sponsored three bills in the legislature. SB 422 (Grayson), AB 1172, (Nguyen), and ACR 55 (J. Gonzalez). Getting authors was unusually difficult this year due to the new limits placed on lawmakers, bill loads getting filled with LA Fire Recovery bills, and several legislative leaders had to reserve spot bills in preparation of problems with the federal administration, and congressional budget outcomes. We received authors for all our bills promoted (SB 664 was written last year) and at this point one died, one got held as a two-year bill, one was chaptered, and one passed through house of origin and is starting in the second house. The full bill package started at 50+ and is now down to 21.
32. Lobbied members of the Assembly and the Senate to sponsor the ARCA Capitol Briefing Day, which included administration officials and advocates speaking to the legislative staffers about the state of developmental services in California.
33. Public speaking to help in building ARCA's strategic partnership (MDT Conference, Housing Symposium, the CA Coalition for Long Term Supports and Services Legislative briefing, ANCOR National Conference, Infant Development Association – Policy Conference, Supported Life Conference, CA Community Living Network Conference, The Arc California Board of Directors and DisCo advocacy event).

34. Meetings with new legislators and staff members to inform them of the developmental services system and the priorities of ARCA and the regional centers locally.
35. Helped organize several presentations on the status of the federal budget proceedings and the potential impact on our community. Submitted several congressional updates focused on the House budget votes. Help provide testimony for the National Medicaid Vigil in Washington DC.
36. Helped organize the “Keep Your Promise” rally and facilitated the event speakers/program. Secure commitments from legislators and self-advocates, and family members to speak at the rally. Held follow-up meetings with legislators.
37. Provided presentations on the governor’s May Revision to the budget.
38. Presentations for the member regional centers: San Andreas Regional Center, Frank D Lanterman Board and Provider joint meeting, Alta CA Regional Center, San Gabriel Pomona Regional Center, San Diego Regional Center (public policy committee), and presented to all regional representatives during the Grassroots Day conference.
39. Brought in an incoming law school student to apprentice in our office to learn about developmental services, disability history, and the legislative process. The apprentice provided support position testimony “me toos,” monitored legislative hearings and reported back.
40. Member Development: Developed and implemented the Partners in Policymaking advocacy training program for regional center director identified advocates. Organized the 2024 ARCA Academy training for board and leadership staff . Drafted the extensive Board Onboarding and Competencies Report with the ARCA board delegates, which will be completed by August. It will provide the framework for the development board offering for the ARCA Academy for years to come. Published a design plan to create a regional center executive director executive level staff development compendium. The first phase of the project, job description review, is underway currently.

CLIENT SERVICES

August 2025



General Announcements & Information

New DDS Directives / Guidelines:

- 6/18/25 – [Health or Safety Waivers](#)
- 6/20/25 – [Operational & Service Provision Flexibilities](#)
- 6/25/25 – [Environmental Accessibility, Service Code 104](#)
- 7/2/25 – [American Sign Language Training and Support Service](#)
- 7/3/25 – [Status Code 'M' \(monitoring\) in Sandis](#)
- 7/11/25 – [2024/2025 Annual Purchase of Service Reports](#)
- 7/14/25 – [Repeal of Parental Fee Program](#)
- 7/14/25 – [Purchase of Out-of-State Services](#)

Trailer Bill Language

AB 143 2025/2026 Developmental Services Trailer Bill Language Summary:

[2025-26 Developmental Services Trailer Bill Language-Summary-Final.pdf / SDRC](#)

Targeted Case Management (TCM) Time Study

The Department of Developmental Services (DDS) conducts the Targeted Case Management (TCM) Time Study every three years. The purpose of the Time Study is to determine the TCM rates based on the Regional Center's cost of providing case management services. Medi-CAL reimburses the cost of staff providing direct case management services to TCM-eligible individuals. To obtain these funds, the federal government requires the Time Study to

determine the Regional Center's costs of providing services. During the time study period, Service Coordinators complete TCM documentation for their daily activities in 15-minute increments and must account for all hours worked each day.

San Diego Regional Center's Time Study is **September 2025**.
We will be doing a **Practice Time Study 8/4/25 – 8/15/25**

Participant Directed Services (PDS) Transportation Voucher Training

All Service Coordinators and Program Managers are **required to attend**

Training Dates / Register for ONE on LEAP:

- **8/5 1pm** <https://sdrcl.org/student/mycourse.aspx?id=86264047-79a4-40f3-910f-c3cec34c66fe>
- **8/14 11am** <https://sdrcl.org/student/mycourse.aspx?id=ed9d9177-a237-4589-b00c-c229bf464f78>
- **8/20 1pm** <https://sdrcl.org/student/mycourse.aspx?id=4fce5536-81b3-4fe6-9857-8515de875e1a>

Client Photos in SANDIS

As of July 22, we still have 825 individuals who need a photo uploaded to their SANDIS record in order to avoid interruption with their Pronto (transportation) cards. Photos must be in the client record no later than 8/31/25 or their cards will not work starting 9/1. Clients can have their photos taken at the Kearny Mesa office on 8/11 and 8/15 between 8am – 4pm in the Boardroom/Ste 100. Service Coordinators are also encouraged to schedule quick visits with their clients in order to get these photos and meet this deadline.

Rate Reform

Collaboration continues between multiple departments and weekly office hours provide ongoing updates, resources and a space for problem solving. The Rate Reform Service Code schedule and many other resources can be found at [SDRC Rates](#) (Service Coordination Resource Page).

National Core Indicator (NCI) Surveys

SDRC met the benchmark of at least 400 participant responses by 6/30/25. SDRC is collaborating with State Counsel on Developmental Disabilities (SCDD) to schedule ongoing NCI trainings for SDRC staff.

Risk Mitigation

The San Diego Regional Center (SDRC) Risk Management Committee meets monthly and is composed of staff from clinical services, community services, and client services. During these meetings, the team is identifying trends that represent health and safety concerns for the people served at SDRC. Beginning in June, they are presenting risk mitigation topics to be shared with the community via social media and SDRC staff in the newsletter. It is called Risk Busters. The purpose is to highlight prevention tools, and share strategies, bring awareness and education and to mitigate illnesses and other risks to a person's health and well-being. The first

Risk Busters was on Water Safety and presented in June. For July, the topic is Heat Illness and Exhaustion.

New! Office Hours [Master Calendar](#)

Need some assistance? Check the calendar for upcoming dates/times for Rate Reform, SDP Review Team, Health & Safety Waiver, Institutional Deeming, Social Rec/Restored Services, Placement Review Team, SIRs/Waiver Rager, Complex Needs Roundtable, Participant Directed Services, SDRC/APS roundtables and more!

AB 1663 (the Probate Conservatorship Reform and Supported Decision-Making Act) became law January 1, 2023. The Act reforms the existing conservatorship law and emphasizes the importance of reviewing the least restrictive measures first. Specifically, exploring Supported Decision-Making (SDM) as an alternative to conservatorship. Regional centers are required to explore the least restrictive alternatives to conservatorship first. San Diego Regional Center has a workgroup including self-advocates, stakeholders, service coordinators, and program managers to operationalize the principles of supported decision making and educate the community about the importance of protecting the rights and autonomy of individuals with intellectual and developmental disabilities. We presume that people have the capacity to make decisions and with support can make choices for themselves. SDRC collaborates on a bi-monthly basis with the County Public Guardian's Office to discuss issues related to conservatorship.

California Public Records Act (CPRA)

Regional centers will be required to meet the requirements of the California Public Records Act (CPRA) starting January 1, 2026. Upon request, regional centers will be required to release to members of the public most records maintained by the regional center that are not tied to specific individuals we serve. This includes emails, data, and formal documents generated by our staff related to the work of the regional center. We have been working with the Association of Regional Center Agencies (ARCA) in coordinating statewide preparations for implementation of the CPRA, including hiring a law firm that specializes in this area to provide training for regional centers. More information and staff training will be coming soon!

Standardized Respite Assessment Tool

DDS released a draft of the tool, provided a webinar to the community, and have opened the public comment period through the end of August. You can review the tool below and provide input, comments, and questions for clarification via [this feedback link](#). Implementation planning/trainings for Regional Center staff are supposed to take place Sept-Dec.

[*Standardized Respite Tool](#)

Early Childhood (ECH)

Early Start Child Find and Information

As part of the Regional Center Performance Measures (RCPM) program for Fiscal Year (FY) 2024-2025, SDRC has completed and submitted to the Department of Developmental Services information related to child-find activities.

The desired outcome of this measure is children who are eligible for Early Start are identified and enrolled in a timely manner. To meet this outcome, participating regional centers will confirm the activities completed as part of the Child Find Plan previously submitted in FY 2022-2023.

For FY 2024-2025, regional centers were asked to confirm by 7/31/25:

Number of outreach/child-find activities supported by regional center staff or funding, reported by type of activity.

SDRC submitted data early and continues to meet all areas of this performance measure which brings important funds into our system.

AAC Directive

SDRC has been praised by DDS and asked to share best practices or new approaches with other RCs, and will be presenting in the ARCA Early Start Discipline Meeting. SDRC will also be featured in the DDS newsletter to demonstrate how we've made communication aids more accessible to toddlers in Early Start. Data shows SDRC went from 0 toddlers using 112 services in FY 23-24, to 51 toddlers in 24-25.

Rate Reform

The early childhood team has been busy entering thousands of new Purchase of Service for 116 and 805 providers as part of DDS rate reform. The Early Childhood team has helped develop processes to ensure a smooth transition from previous rate to new rates, for our Service Coordinators, providers, and families.

Children & Transition Aged Youth (TAY)

DDS Performance Measure – Competitive Integrated Employment

In an effort to meet a DDS performance measure related to participation in Competitive Integrated Employment (CIE), the team has been promoting the Coordinated Career Pathways (CCP) program. The CCP program is designed to identify individual career goals, interests, and strengths, as well as how barriers and challenges to employment can be overcome. Many individuals in TAY units are eligible for this service if they are within 2 years of exiting from the school district. A refresher training on CCP has been scheduled for 8/19/25.

AB 1663 – Alternatives to Conservatorship

AB 1663 requires that less restrictive alternatives, including supported-decision making (SDM), be explored before conservatorship is granted. SDRC is committed to empowering the

individuals we support to make their own choices with help from people they trust. SDRC's SDM team has put together a resource library of information on SDM and alternatives to conservatorship, which can be found on Wiki. PMs and SCs from TAY and adult units are currently working on incorporating alternatives to conservatorship/Supported Decision Making in the Conservatorship letter. Trainings for PMs and SCs will be offered in the fall.

Rate Reform

The Children/TAY team have been attending trainings the last few months in preparation for completing thousands of new Purchase of Service for the individuals that are receiving Independent Living Services and Respite Services. These changes are part of the statewide DDS rate reform.

Children/TAY specialty trainings & Wiki updates

The Children/TAY Leadership team has developed a new training series for Children/TAY SCs, scheduled to begin in October 2025. Training topics include eligibility, children/TAY services (e.g., respite, daycare), TAY transition/planning for 18, conservatorship and SDM, and DDS performance measures and directives. The team has also developed a Wiki workspace containing resources for Children & TAY SCs. The goal of the training series and Wiki workspace is to ensure that SCs have the resources they need to best support the individuals we serve as well as to ensure consistency across units/regions.

Adult In-Home

Employment

San Diego Regional Center continues to prioritize **competitive integrated employment** for clients. This has recently been highlighted by a collaboration with Options for All and Project Search on paid internship opportunities. In June, a cohort of 10 individuals completed a 9-month internship at Legoland and 7 were hired. This partnership has recently established a new cohort of individuals for a paid internship at the San Diego Zoo.

Housing

Client Services, in partnership with Community Services, is preparing to launch a new Housing Support Specialist service **(089)**. This service will assist clients in navigating and securing stable housing, with a focus on individualized support to meet each person's unique needs. Currently, SDRC is part of 6 affordable housing developments across San Diego and Imperial counties, all of which are expected to increase access to secure housing options for individuals served.

Community Collaboration

The Adult in Home specialty will collaborate with San Diego County Adult Protective Services **(APS)** in August to deliver training on San Diego Regional Center services to the county's new hire cohort. This presentation will focus on the intake process and available support for

individuals with developmental disabilities. In addition, SDRC and APS continue to co-facilitate quarterly interagency roundtables that promote collaboration to best support mutual clients. Client Services, in partnership with Community Services, is planning an employment conference, “**Adults Achieving CIE**”, which will take place on 12/2/2025. More information to come.

Aging

The Aging Resource Group continues to convene on a monthly basis to address emerging trends, challenges, and best practices related to serving the aging population. As part of its ongoing efforts to align with **California’s Master Plan for Aging**, the group is actively developing a comprehensive Service Coordinator Checklist tailored to the unique needs of aging clients. This checklist aims to ensure that all essential domains such as health, safety, housing, financial, social connection, and long-term planning are consistently reviewed and addressed. Looking ahead, the Aging Resource Group intends to partner with Community Services and community-based partners to host a Resource Fair focused for aging individuals and their caregivers.

Residential

Rate Reform ([Rate Reform: Residential December 20, 2024 Training - DDS](#))

The residential team is in the midst of transitioning all vendored residential providers’ Purchase of Service contracts to their updated rates within SANDIS. SDRC’s residential team supports over 3000 clients in accessing supports from ~600 vendors county-wide.

Repeal of the Parental Fee Program ([July 14th Directive - DDS](#))

A new DDS directive was released on 7/14/25 which repealed the Parental Fee Program for certain 24-hour out-of-home services. This change is retroactive to July 1st 2025. This means that no new fees will be charged to families after June 30, 2025, but any unpaid fees previous to that date will still be collected. Questions regarding the Parental Fee Program should be directed to the Department’s Parental Fee Program staff either by phone at (800)862-0007 or email at ddsparentalfee@dds.ca.gov.

AB 2083 System of Care ([System of Care - California Health and Human Services](#))

CA State Assembly Bill 2083 was introduced in 2020 as a way to increase collaboration across the multitude of public programs (Regional Centers being one of these programs) statewide to ensure that the children and youth served by our collective Systems of Care receive the support they need. As part of this cross-systems work, members of SDRC’s Residential Team participate in several sub groups (teams) to promote this collaboration and increase access to timely care.

- SDRC participates weekly on the Interagency Placement Committee (IPC) hosted by Child and Family Wellbeing (CFWB). Our role on this committee is to ensure children/youth who are dually served by SDRC and CFWB have access to Short-Term Residential Therapeutic Programs (STRTPs) in San Diego County when needed. This participation has greatly increased collaboration between our agencies and has promoted stronger,

shared understanding of resources available to the children/youth served by each system of care. ([Short-Term Residential Therapeutic Program - CDSS](#))

- Polinsky Children's Center (PCC) Collaboration: SDRC and CFWB meet weekly to break down any barriers to placement and identify stable placement options for any children/youth that may require this higher level of support. Through this collaboration, we have seen a steep decline in the number of children requiring care at PCC who are also served by SDRC. This partnership has also allowed our agencies to react in a more proactive manner to identify services and supports for children/families that can be provided in the family home to intervene before a crisis occurs.
- Members of SDRC's residential team participate in a monthly workgroup with DDS and other Regional Centers across California to share information regarding this System of Care work, and to troubleshoot any potential barriers to access for clients served by SDRC.
- Members of SDRC's residential team also participate in a local workgroup with San Diego County and other community partners to discuss how to best operationalize this improved collaboration across our collective systems of care.

Home and Community-Based Services (HCBS) Final Rule ([HCBS Final Rule - DDS](#))

In collaboration with SDRC's Community Services department, the residential team will be hosting a full day retreat for Service Coordinators and Program Managers regarding HCBS Final Rule and how we can best support our vendor network with adhering to these Federal regulations. An invitation was also extended to our partners at Community Care Licensing (CCL) for both San Diego and Riverside counties, and we are pleased to report that managers from those teams will also be present at this training, building upon the strong foundations for collaboration that our agencies have established over the years.

Imperial County

Social Recreation

The Imperial Office in partnership with San Diego Regional Center Community Services has expanded the social recreation providers in the Imperial Valley region. A Social Recreation Community Workshop is scheduled on Wednesday September 10, 2025. The goal of the workshops is for providers to ask questions, network with other community partners, meet San Diego Regional Center Staff and learn about the vendorization process.

ASIC Mobile Autism Diagnosis Unit

The ASIC team and San Diego State University professionals have completed 3 psychological assessments. These assessments are used to assist in determining eligibility for SDRC services. The purpose of the ASIC Mobile Autism Diagnosis Unit is to offer these assessments in rural areas of Imperial Valley, and increase access to services.

Miraluz Apartments

There are 15 set aside apartments in Imperial Valley for individuals/families supported by San Diego Regional Center. The team is identifying individuals and assisting them with the application process. The targeted opening is September-October.

Special Projects

Enhanced Service Coordination Unit 37:

Resources that include referral process, program design flowchart and training material can be located at [SDRC / Enhanced Service Coordination Unit 37](#). ESC SCs continue to complete outreach and the ESC Team continues to present at unit meetings. As of May 2025, 237 total individuals have been served by this unit, but we are only at 80% capacity and have about 40 additional spots that can be utilized.

Self-Determination Units 47 & 51

There are currently 988 individuals participating in the Self-Determination Program at SDRC. The SDP Conference, held on June 26, was a great success with over 300 attendees. The SDP team will be participating in the upcoming Feria Conference as well as the SDRC Family and Vendor Resource Fair. SDP is actively recruiting for 4 SDP SC positions. A small workgroup is revising the annual budget renewal form.

Social Recreation

Representatives from multiple departments are working on ways to streamline procedures, including an updated screening tool and review process.

Administrative Support Team

As the agency grows the Office Manager team and the Administrative Support team have been working on improving their processes to assist client services and all other departments we support.

Translation Services: The Translation Team has developed a tracking system to provide accurate data to DDS. Since the beginning of the fiscal year, over 700 translation requests have been processed, and the month of July is not yet over. The team continues to gather additional data to support efficiency and reporting.

Work Request Platform: Due to the growing volume of requests, the Office Management Team is exploring a new work request platform. We have outgrown our current system, and this transition is aimed at improving workflow and reducing delays.

Public Records Act (PRA): Several OM team members are undergoing training and assisting in developing a process to support PRA request handling. In preparation, The Records Team is working on purging client records in alignment with DDS retention guidelines.

Quality Improvement: Members of the OM team are part of several quality improvement efforts, including the Individual Program Plan (IPP) process, quarterly review process and the development of a new conservatorship workflow.



San Diego Regional Center
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Serving individuals with developmental disabilities in San Diego and Imperial Counties

DATE: August 5, 2025
TO: Board of Directors
FROM: Miguel Larios, Director of Community Services
RE: Community Services Report

Community Services: Mission Statement

The mission of the Community Services Department: To provide high quality and meaningful services that are reflective of the diversity of the community of people served by San Diego Regional Center in collaboration with families, agency staff, and community partners. The Community Services Department develops community partnerships through outreach and education about issues and services affecting individuals with developmental disabilities.

Direct Service Professional Internship Program:

The DSP Internship Program is a three-month training and internship program that provides standardized, new direct care workforce entry-level training and practical work experience. This program was launched on August 30, 2024, and focuses on outreach efforts to populations that reflect California's diversity and do not traditionally have a pathway towards jobs in the field of providing services to individuals with developmental and intellectual disabilities.

San Diego Regional Center Data as of July 10, 2025:

- Current Interns needed: 0
- Interns Submitted: 38
- Interns Onboarding: 7
- Interns Placed: 18
- Interns Converted: 17
- Provider Count: 13

Rate Reform and Service Acknowledgement Forms (SAFs)

As the Welfare and Institutions Code, Section 4519.8 requires, the Department of Developmental Services (DDS) submitted a service provider rate study to the Legislature in March 2019. The rate study addressed several areas, including but not limited to, evaluating alternative rate-setting methodologies, the number and types of service codes, and recommendations for simplifying and making service codes more reflective of the services provided. The rate study recommended using "rate models," which identify cost factors and estimated costs for delivering various services and establish rates for services.

On September 19, 2024, DDS released a directive on the full implementation of the Rate Reform. The letter provided some background regarding rate reform, highlights some of the steps that have occurred over the last few years and previews of some upcoming activities.

On April 1, 2025, the Department of Developmental Services issued a directive extending the timeline for completion of Rate Reform Service Acknowledgement Forms (SAFs) from March 31, 2025, to May 30, 2025. In the next few weeks, SDRC will be working diligently to send out the Rate Reform Service Acknowledgements. The directive also provides updates regarding the Quality Incentive Program and Provider Directory

The final phase of Rate Reform is here and may require some quick action from our Service Provider Community. Rate Reform implementation is moving quickly as the Department of Developmental Services (DDS) plans to release a series of directives in the coming months. Directives will provide regional centers and providers with guidance on service descriptions, new components, and timelines. Providers that did not submit the required information in the Provider Directory by May 30, 2025, risk having their billing suspended beginning July 2025. For service providers included in Rate Reform, participation is the only way to attain or keep the 10% quality incentive portion of the new rate.

SDRC reached the goal of 99.1 % compliance. 42 Providers had their billing suspended in July 2025.

Rate Reform: Hold Harmless Policy Timeline Change

There has been a hold harmless policy for providers whose rates exceed the base rate (90 percent or more) of the fully funded rate models. Any provider with an existing rate as of July 1, 2024, that is more than 90 percent of the fully funded rate model, did not experience a decrease in their rate during the hold harmless period. Pursuant to Chapter 12, Statutes of 2025, the end date for the hold harmless period has been revised. The hold harmless provision now expires on February 28, 2026, four months sooner than its previous end date of June 30, 2026

HOLD HARMLESS TIMELINE

SERVICE PROVIDER DIRECTORY

All vendors are required to be entered into the Service Provider Directory & have a signed Service Acknowledgement Form on file by 5/30/2025

MAY
2025

JUNE
2025

CA STATE BUDGET

Changed the HH end date from 6/30/2026 to 2/28/2026

DEC
2025

COMPLETION OF RATE REFORM

Vendors are required to fully transition to Rate Reform model if they are not classified as HH

HOLD HARMLESS POLICY ENDS

Vendors who are classified as HH will have their rates adjusted to equal their benchmark rates (QIP status dependent), effective 3/1/2026

MARCH
2026

New Service Code: 644 American Sign Language (ASL) Training and Support

The Department developed a new service, American Sign Language (ASL) Training and Support – Service Code 644, to help individuals improve or develop their expressive and receptive communication. The service is intended to help individuals improve functional communication skills through the use of formal ASL and to reduce the use of home signs. With appropriate language support, individuals can thrive in expressing their desires and needs, fostering a whole-person-centered environment. Direct support professionals and family members may also receive training while the individual is present to promote more cultural and linguistic understanding of the natural environment.

Service Title: American Sign Language (ASL) Training and Support

Service Code: 644

Service Description:

A regional center shall classify a vendor as language training and support to improve or develop expressive and receptive communication using American Sign Language (ASL). This service is designed to assist individuals who are deaf, hard of hearing or deafblind to improve functional communication skills by improving the use of formal ASL and reduce the use of home signs. The ASL trainer can also train the direct support professionals and family members while the individual is present to promote more cultural and linguistic understanding of the natural environment. These services may also work with individuals and providers to incorporate use of and learning through Alternative Augmentative Communication devices, ASL online resources and online ASL content to increase engagement when learning ASL. ASL Training and Support services are not designed to replace any other services, including care and supervision. They should be used to help facilitate improved communication between service providers or family members and the person receiving services. This service shall not supplant or replace the need for formal interpretation services.

Qualifications:

Staff providing the service must:

1. Have language proficiency from an accredited or nationally recognized institution such as, but not limited to, the American Sign Language Proficiency Interview (ASLPI), Sign Language Proficiency Interview (SLPI), or other recognized language proficiency body.
2. Be assessed proficient to provide at least superior level ratings or higher on ASLPI, SLPI ratings scale.
3. Possess the ability to have a fully shared conversation with in-depth elaboration for both social and work topics, and excellent comprehension in receptive skills.
4. Demonstrate the use of a very broad sign language vocabulary, near native-like production, fluency and prosody and excellent use of sign language grammatical features, and classifiers.

Settings: ASL Training and Support services can be delivered in any setting where an individual lives, works, participates in recreation, or accesses the community for other purposes.

Department Highlights

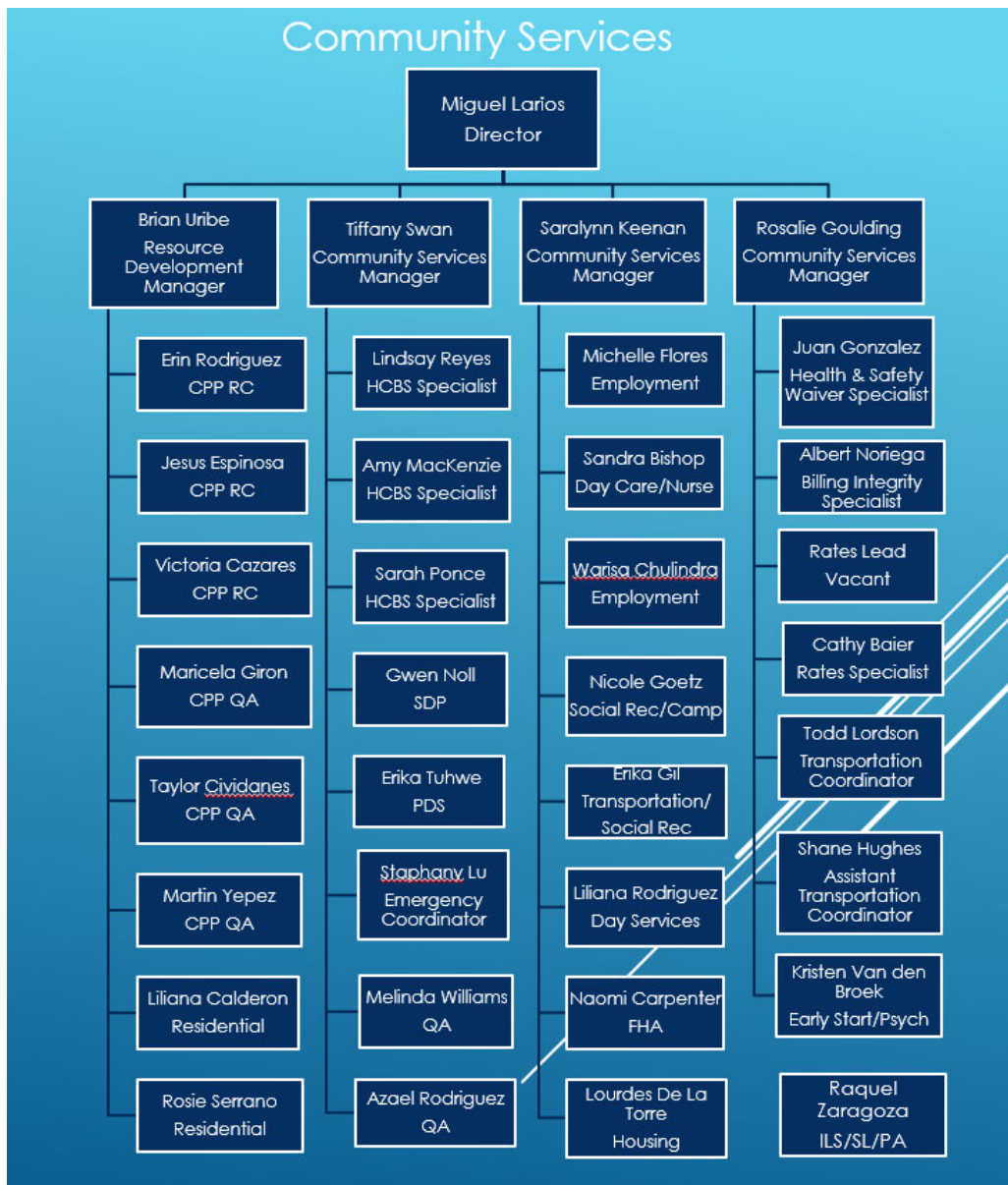
- Coffee with Community Services: 06/30/25-102 providers attended; 07/28/25
- Coordinated Family Supports Roundtable: 05/08/25-13 providers attended
- Supported Living Roundtable: 05/21/25- 47 providers attended; 02/19/25- 35 providers attended; 06/18/25 - 27 providers attended.
- Residential Vendor Roundtable: 05/01/25-67 providers attended, 06/05/25-72 providers attended; 07/03/25-52 providers attended
- Fiscal Management Services (FMS) Roundtable: 05/06/25- 16 providers attended; 06/03/25- 15 providers attended; 07/01/25-23 providers attended
- Independence Facilitation Roundtable: 05/20/25- 25 providers attended; 06/17/25-25 providers attended
- In-Home Respite Roundtable: 06/04/25-31 providers attended.
- Family Home Agency Roundtable: 06/16/25-4 providers attended
- HCBS Power hour: 05/07/25-48 providers attended

It is my pleasure to announce the following updates to the Community Services Department:

Sarah Ponce has been hired to be one of the HCBS Specialist. She has been a bilingual Service Coordinator with the Regional Center for nine years Unit 17 (Early Childhood) and then in Unit 32 (Children's Unit). Before that, she spent four years in the ABA field with Novata CARES, now known as CARES Fred Finch. She has a Bachelor's in Psychology from UC Riverside and a Master's in Human Behavior. Her start date will be August 4th, 2025.

Melinda Williams has been hired to be our Non-CPP Quality Assurance Specialist. She joined SDRC on April 1st, 2024, with Unit 10 (Community Placement Plan Unit). Prior to this, she worked for Stein Education Day Program for 6 years as a Program Supervisor. She has a Master's degree in Special Education with an emphasis in ABA. Her start date is pending.

Updated Org Chart





San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdrc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

DATE: August 12, 2025

TO: Board of Directors

FROM: Celeste Graham PT—Director, Clinical Services

RE: Clinical Services Department Report (May – July 2025)

Department-Wide:

- **Quality Improvement Project (QIP)**—In July 2025, this multidisciplinary committee (including Administrative Support Assistant, Physician Consultant, Director, Intake Coordinator and Manager, Intake Coordinators) began “phase 2” of the QIP related to the Eligibility Decisions process with the goal to meet or exceed the 120-day timeline. A welcome addition to the workgroup was the Coordinator of Psychology Services, which rounded out the key stakeholders for the project. During Phase 1, the workgroup assessed all parts of the Eligibility Determination process and timelines. Phase 2 will focus on implementation of a “change idea” to test first, with the intent to improve timeliness to refer for eligibility review or for a psychology evaluation after a specific number of days waiting for supporting documentation.
- **National Association of State Directors of Developmental Disabilities Services (NASDDDS)**—The Director of Clinical Services attended the NASDDDS Federal Policy Symposium in Virginia June 11-13, 2025, which provided a learning and networking opportunity with leaders from California and other state agencies.
- **Clinical Services Department Retreat**—On May 22, 2025, Clinical Services enjoyed their annual retreat at Kate Sessions Park. In addition to team building activities with a “You Rock” theme, the team utilized this time to develop goals and areas of focus for FY26, including “branding” Clinical Services to improve communication and collaboration with other SDRC departments.
- **Team Building**—On July 31, 2025, the team held an Ice Cream Social for a mid-summer team building and “morale booster” gathering.

Intake Services:

- **New Team Members**—Over the past 3 months, Intake welcomed four new Intake Coordinators: Gina Swaim (hired externally); Tracy Guzman, Cecilia Rodriguez, Lizbeth Serna (transferred within SDRC)

Behavior Services:

- **New Team Member**—Welcomed Conor Lloyd, Behavior Specialist, who transferred from Client Services on July 21, 2025.
- **Emerging Managers Academy**—Katie Sorenson, Autism Coordinator, was selected to participate in the Emerging Managers Academy which was held between April – June 2025.
- **Community Partner Training**—Katie Sorenson, along with Yessenia Rodriguez (Program Manager from Client Services), conducted a training on Autism on May 15, 2025 at the Family Engagement Center in Chula Vista.

Medical/Dental

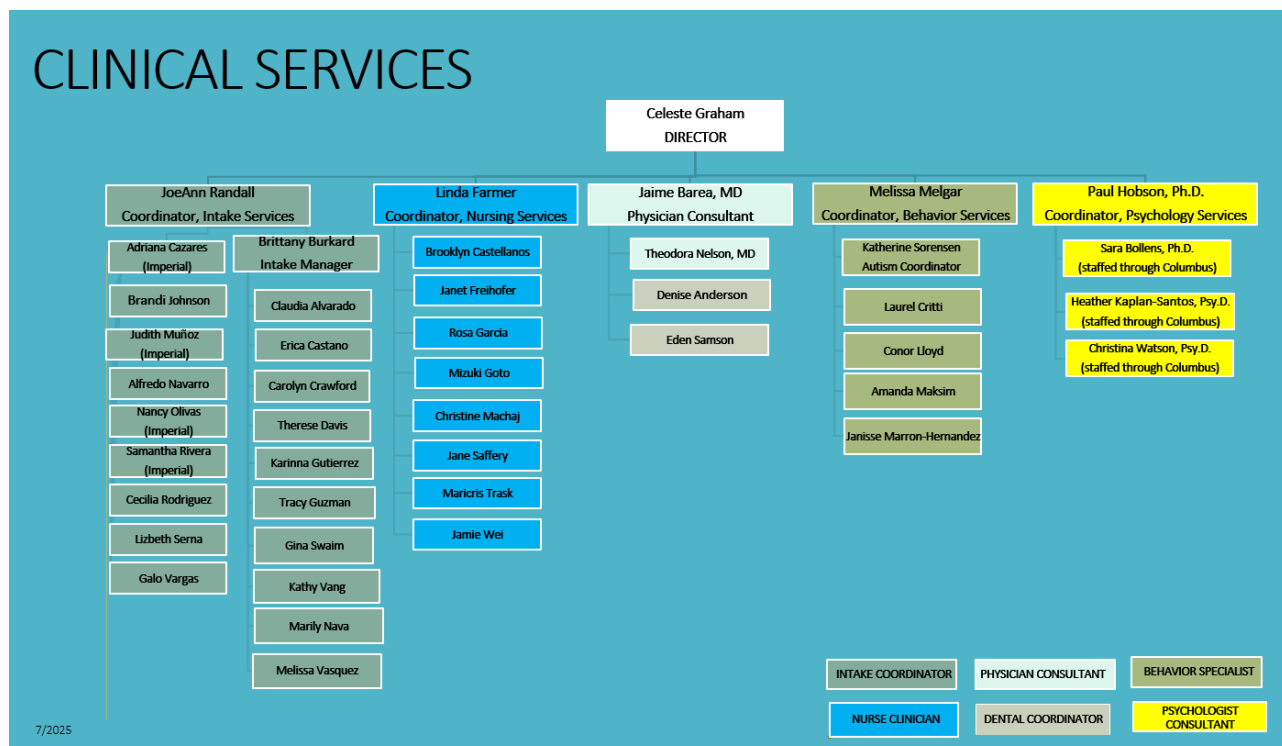
- **SDRC Recognition by La Maestra Community Health Centers**—La Maestra celebrated its 35th Anniversary on May 2, 2025, where they recognized SDRC with an award to showcase the positive impact in under-resourced communities that both agencies have reached together. SDRC was represented at the event by Denise Anderson, one of our two Dental Coordinators, and Mark Klaus, Executive Director.
- **Healthy San Diego (HSD) Oral Health Workgroup Meeting**—Denise Anderson, Dental Coordinator, and Celeste Graham, Director of Clinical Services, were invited to join this workgroup, which is part of the Medi-Cal Transformation Task Force. The first quarterly meeting was held on July 15, 2025. The purpose of this workgroup is “to improve the oral health of Medi-Cal Managed Care members in San Diego County” and is comprised of Managed Care Plans, County of San Diego, and community representatives.

Nursing Services:

- **New Team Member**—Welcomed Brooklyn Castellanos, Nurse Clinician, on May 12, 2025.
- **Pharmacotherapy Consultation**—Along with other SDRC departments, assisted with onboarding a new Pharmacist vendor to assist clients with medication concerns. Developed criteria and a workflow to access pharmacotherapy consultation.
- **Nurse Vendors**—In collaboration with Community Services, 8 new nurse vendors were onboarded, which will broaden the reach across the County for nursing services such as performing Nursing Health Assessments and providing respite care.

Psychological Services:

- **New Manager**—Welcomed Dr. Paul Hobson as our new Coordinator of Psychology Services on May 27, 2025, filling the position that has been vacant since September 2024.





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DATE: August 4, 2025
TO: Board of Directors
FROM: Clorinda Merino, Director of Equity
RE: DEIA Department (June through August 2025)

Department Team:

- **Clorinda Merino Fausto** – Director - Responsible for formulating, developing, and implementing equity policies and practices within the organization.
- **Jennifer Sanchez** - DEIA Program Manager - Develop and implement strategies and initiatives to foster a diverse, inclusive, and equitable environment for all staff, individuals and families served and community partners.
- **Bernadette Boren** - Tribal Outreach Specialist - Responsible for identifying services gaps and unmet needs in Tribal communities, assisting with resource development to increase access to services
- **Brenda Bello Vazquez** - Cultural Specialist - Implementation of SDRC's cultural competency initiatives to help ensure that the delivery of services and supports is culturally/linguistically inclusive
- **Pedro Salcedo** - Language Accessibility Specialist - Manage, report, and implement the Language Access and Cultural Competency (LACC) Grant.
- **Sonia Griffin** - Early Start Service Coordinator - Support families in the community that are experiencing homelessness and immigration challenges.
- **Noemi Silva** - Early Start Service Coordinator - Support outreach events to raise awareness about SDRC services and the California Early Start Program
- **Monique McIntosh** - Deaf & Hard of Hearing Specialist - Point person and subject matter expert on the provision of services to Deaf and Hard of Hearing individuals with intellectual and developmental disabilities.

The DEIA Team will:

- Identify cultural and linguistic barriers to accessing SDRC services
- Create and implement strategies and processes to reduce systemic barriers and increase access to our services
- Reduce disparities in Purchase of Service (POS) for our diverse, underserved, and underrepresented, communities
- Identify potential service providers that reflect the communities we serve
- Establish strong relationships with community partners to increase knowledge of SDRC and the services we provide.

Community Engagement Activities:

- We received the LACC contract renewal with a slight funding decrease to \$1,287,423 from the \$1,426,386 that we had last year. We have made some adjustments with our subcontractors and will be focusing more of supporting current agencies working with our underserved communities and will be more selective in what events we participate in based on past years attendance and impact.
- We renewed our LACC contracts with Self Determined Futures and INDay to continue both support groups with contract dates of August 1, 2025 to June 30, 2026.
- Sonia visited Father Joe's Village in June 3rd, with one screening and one referral. She visited Birthline on June 10th, with one screening and one referral. She visited Solutions for Change on June 10th, with 3 screenings and no referrals. She visited a new shelter Operation Hope for the first time on June 11th, with one screening and one referral. Sonia visited Father Joe's Village in July 23rd, with three screenings and one referral. She visited Solutions for Change on July 17th, with 1 screening and 1 referral. She visited Birthline on July 8th with no screenings.

- Monique conducted a Deaf Culture Training to service providers on June 18th, 2025. She is currently working with Community Services on the new service American Sign Language Training and Support Service.
- June 4th, 2025 – Early Learners Resource Fair – Event attendance of about 100. We had 72 people visit our table. Location was 2375 Congress St. SD 92110. We conducted 5 screenings with no referrals.
- On June 14th, 2025, we attended the Day at the Park: Bayfront Park in 980 Marina Way Chula Vista 91910. We conducted 9 screenings with 2 referrals.
- On June 21st, Sonia attended the ECS Summer Kickoff where there were 6 screenings and 4 referrals.
- On June 27th, 2025, Sonia attended the EFMP Summer Event in MCAS Miramar where there were 3 screenings with 3 referrals.
- On July 11th, 2025 – All Inclusive Day of Play – Event attendance of about 1,000. We had 250 people visit our table. Location was 10440 Black Mountain Rd. 92126. We conducted 14 screenings with 11 referrals.
- On July 12th, 2025, we attended Rooted in Healing in Pala Rey Youth Camp. We conducted 3 screenings with 1 referral.
- On July 13th, 2025, we attended the Padres Game at Petco Park. Event attendance was about 250 people with 183 visiting our table.
- On July 21st, Sonia attended the Loma Verde Elementary Back to School Night in 1450 Loma Lane Chula Vista 91911. Event attendance was 400, and we had 193 people visit our table. We conducted 8 screenings and 1 referral (two parents declined referral).
- On August 5th, Sonia will be attending and providing screenings at the Placticando con mi Gente at Gompers Park.
- On August 8th, Noemi will be attending and providing screenings at the Desert Region Career and Resource Expo.
- On August 12th, Sonia will be visiting Birthline of San Diego.
- On August 21st, Sonia will be attending and providing screenings at the Euclid Elementary Back to School Night in Euclid Elementary.
- On August 21st, Sonia will be attending and providing screenings at the Ventanilla de Salud at the Mexican Consulate.
- On August 29th – 31st, Bernadette will be attending the Barona Powwow.

Support Groups:

1. African American Support Group meets monthly at the Kroc Center and attendance varies from 15-30 attendees. Topics are selected by the attendees and currently let by two Service Coordinators with the support of our Cultural Specialist and Language Accessibility Specialist. July 17th was on Self Determination Orientation, we had attendance of 33 individuals.
2. Middle Eastern Support Group meets bi-monthly at InDay program office (El Cajon) and attendance varies from 2 to 5 attendees. Topics are selected by the attendees and currently led by Nora Marzeena, owner of INDay Programs with support from SDRC Language Accessibility Specialist and Cultural Specialist.





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Serving individuals with developmental disabilities in San Diego and Imperial Counties

MEMORANDUM

DATE: August 5, 2025
TO: Board of Directors
FROM: Seth Mader, Chief Information Officer
RE: IT Department Report

IT Quality Improvement Plans

Quality improvement plans (QIP's) aren't just for DDS to assign to Regional Centers and vendors. At SDRC, we are taking that one step further. Each department is looking at ways to improve the work that they do.

The IT department QIP's focus on two main goals:

- 1) To improve computer network availability and stability
- 2) reduce the response time for calls and emails to our IT Helpdesk.

The first step(s) is to operationally define the data points of these two things and then get a baseline of that data over time. Once that is established, the IT managers will get together to brainstorm strategies for improvement.

GenAI

As you've likely noticed, generative artificial intelligence (GenAI) is everywhere and evolving rapidly.

California is currently developing guidelines for the use of AI within government agencies, including the Department of Developmental Services (DDS). Regional Centers will be required to follow the guidelines DDS develops including an application to request the use of GenAI. SDRC is proud to be the first Regional Center to use DDS' new online application to use GenAI for the SANDIS AI project.



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SANDIS Summer Newsletter

SANDIS has revived its quarterly newsletter that is sent to all Regional Centers. It highlights new software updates that include POS request status notifications and enhancements to the new, statewide, standardized IPP and Amendment programs.

Here is a link to the online version of the newsletter, but a hard copy of it should be included in your Board packet:

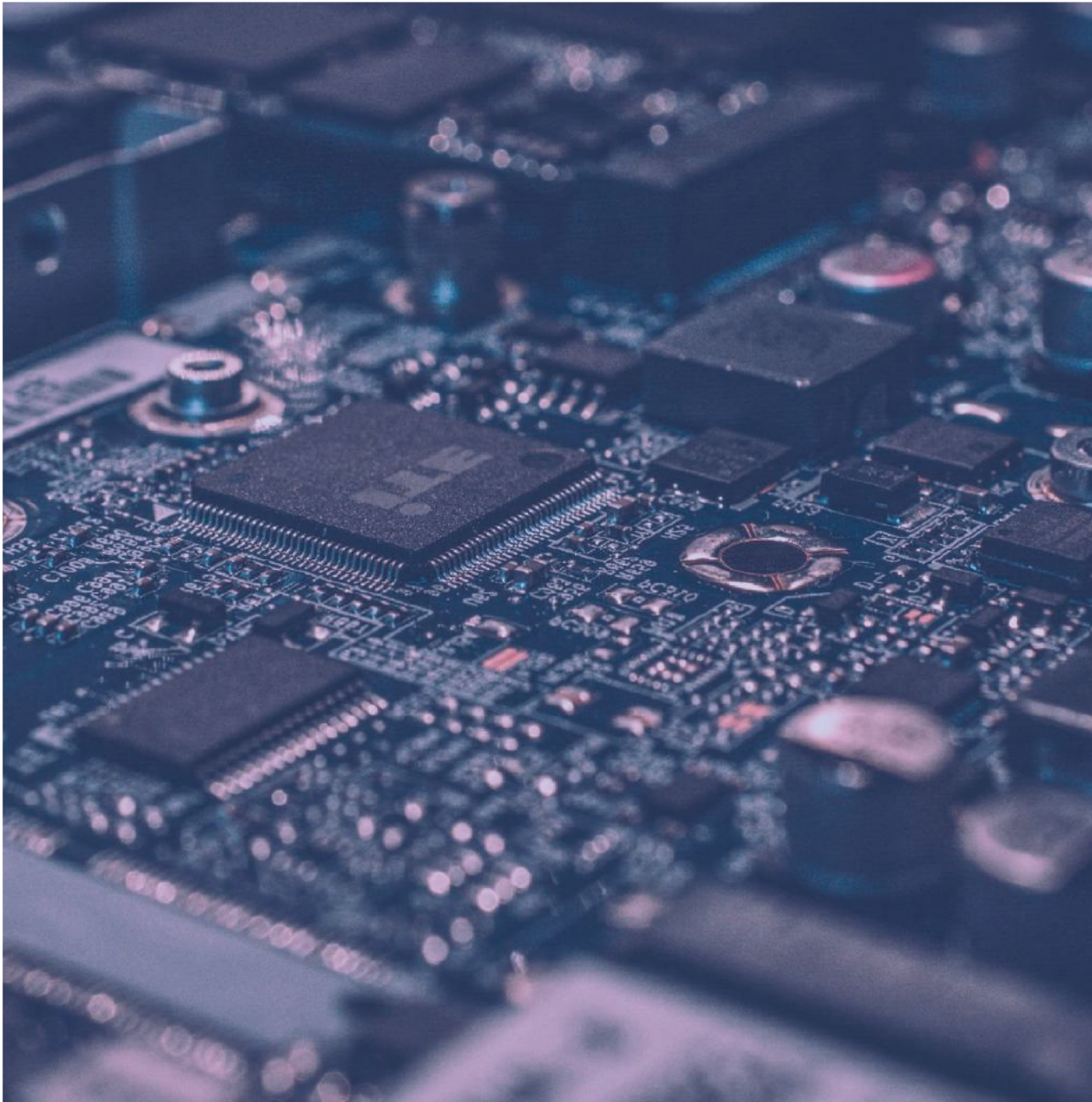
<https://my.visme.co/v/n0qrg3vn-446moy#s5>

SANDIS Statewide Conference

When time and funding is available, SANDIS tries to host a statewide conference in San Diego. SANDIS invites representatives from all 21 Regional Centers and DDS to attend. The conference typically lasts 2 to 3 days. Topics includes a deeper review of available features that can enhance the service coordination to the individuals Centers serve and future projects that are still being developed. This year's conference is scheduled for November 4th and 5th.

SANDIS Solutions Newsletter

SUMMER 2025



 **SANDIS 8.6**

PEOPLE WHO LISTEN. SOLUTIONS THAT WORK.



MEET THE TEAM

LEADERSHIP

Meet the team leading our technology and operations forward:

SETH M.

Chief Information Officer

ADRIANA R.

Manager of Software Development

ARTURO E.

Manager of Application Support

CHRIS G.

Assistant Manager of Application Support

SUPPORT TEAM

The team behind supporting users, solving issues, and keeping SANDIS running smoothly for everyone:

ARMIDA A.

Application Analyst

MELISSA D.

Application Analyst

MARK M.

Application Analyst

MAURA M.

Application Analyst

CHARLES W.

Application Analyst

POS In Review Alert

Did you know there's a built-in notification system to help stay on top of POS (Purchase of Service) requests?

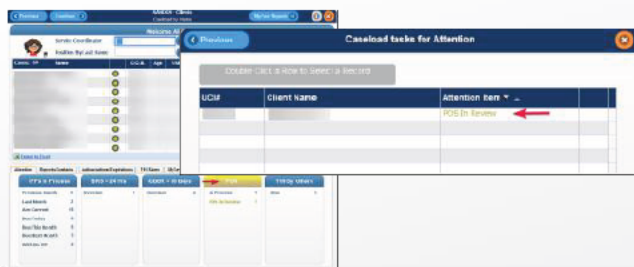
WHAT IS THE POS IN REVIEW ALERT?

POS	
In Process	106
POS In Review	12

POS In Review 12

This alert notifies Service Coordinators (SCs) and Program Managers (PMs) when a Purchase of Service Request is placed "In Review" by Business Services - keeping the team informed instantly!

HOW IT APPEARS AND WHAT IT MEANS



When POS requests are placed in review, a **yellow** POS header will appear on the SC's Welcome Screen.

- Clicking on this header opens a list of clients with POS requests, including ones with this status.
- Remember: this alert is Informational only!

WHY IT MATTERS & WHAT TO DO

The **POS In Review Alert** helps track pending requests and prevent delays. If a request stays In Review too long or you can't modify it, contact your Program Manager or Business Office for assistance. Staying proactive keeps services on track.



WHAT'S NEW IN SANDIS 8.6?

STANDARDIZED INDIVIDUAL PROGRAM PLAN

An evolution on the Legacy IPP and PCT-IPPs, the new S-IPP brings greater flexibility and puts individuals in control of shaping plans that reflect their unique goals and needs.

Standardized Individual Program Plan

Name: Beth Alpha
DOB: 11/11/1111 (Age: 44)
Language: English
Developed by: MELISSA RINDTAM, BA

San Diego Regional Center
Person/Family Centered Planning
INDIVIDUAL PROGRAM PLAN (IPP)

UCIP: 1234567
Date of IPP: 01/01/2025
Next IPP: 03/31/2028
Medicaid Mail Follow up On

INTRODUCTION
Things People Should Know About Me:
People should know that I am smart and kind.
What People Like And Admire About Me:
People admire that I am resilient.
Successes I Want Others To Know About:
I want others to know that I have learned to successfully feed myself.

HOW THIS PLAN WAS DEVELOPED
Where and My Meeting happened:
01/03/2025
What Part Did I Choose To Play In Making My Plan?
I let others know what activities excite me through my words and gestures.
I love movement and going out in the community.
Who Also Helped With My Plan?

LIFE AREA Narrative Text Areas

- Choice/Advocacy Completed
- Community Participation Completed
- Education/Learning Completed

AMENDMENTS

Say hello to Amendments (S-IPAs) - previously referred to as Addendums. These can be used to make updates after an S-IPP is finalized - whether it's adding, removing, or changing narratives or services - without having to create a brand new S-IPP.

Standardized Individual Program Plan

Name: June Bloom
DOB: 11/11/1111 (Age: 62)
Language: English
Developed by: MAURA MENDEZ

San Diego Regional Center
Person/Family Centered Planning
SIPP AMENDMENT

UCIP: 1234567
Date of IPP: 01/01/2025
Amendment: 01
Medicaid Mail Follow up On

INTRODUCTION
Things People Should Know About Me:
I am hard working.
What People Like And Admire About Me:
I am gentle, kind, and take responsibilities well.
Successes I Want Others To Know About:
I am gentle, kind, and take responsibilities well.

LIFE AREAS
LIFE AREA - Healthcare/Wellness
The Outcome I Choose Is:
June would like to obtain optimum health and will follow recommendations from her doctor.

Showing most recent Narratives

Select	Section	Narrative Content
<input type="checkbox"/>	HOW THIS PLAN WAS DEVELOPED	
<input type="checkbox"/>	VISION FOR THE FUTURE	
<input type="checkbox"/>	COMMUNICATION	
<input type="checkbox"/>	DECISION-MAKING	
<input type="checkbox"/>	LIFE AREA - Education/Learning	
<input type="checkbox"/>	LIFE AREA - Employment	
<input type="checkbox"/>	LIFE AREA - Personal Emotional Care	
<input type="checkbox"/>	EMERGENCY PLANNING	





SAVE THE DATE

FOR THE

SANDIS CONFERENCE



November 4 - 5, 2025



Bania Resort Hotel
998 West Mission Bay Dr
San Diego, CA, 92109



[Click Here to Pre-Register](#)

EVENT PROGRAM TO FOLLOW

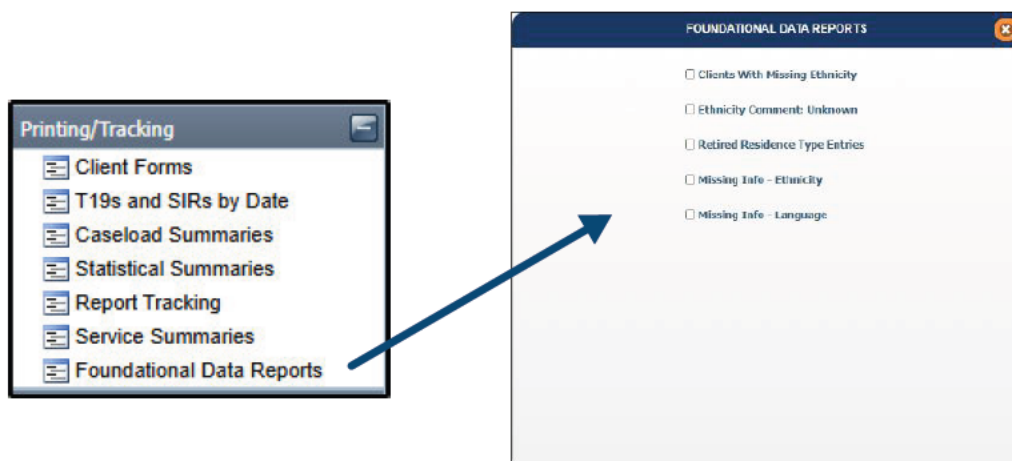




WHAT'S NEW IN SANDIS 8.6?

► FOUNDATIONAL DATA REPORTS

A new Foundational Data Reports menu option has been added! These reports help identify with missing information or outdated resident types in their records, making it easier to keep data updated and accurate.



► NEW STATUS AND RESIDENCE TYPE CODES

New updates include the addition of status code **M** and residence type **11** (with **12**, **13**, and **22** removed).

► IHSS REPORT

A new IHSS Report program has been added under the Admin Tracking menu, allowing to quickly access a list of individuals receiving IHSS.



S-IPP and S-IPA

WHAT TO KNOW BEFORE CREATING REPORT

CREATE REPORTS IN CHRONOLOGICAL ORDER

Date	Written By	Add New Report	Document	Status
1/03/2025	DINDIMAN, MELISSA		SIPP	NEW IPP
3/30/2022	TEST, JANE		PCT IPP	DISTRIBUTED/LOCKED
4/23/2019	TEST, JANE		IPP	DISTRIBUTED/LOCKED
3/09/2016	TEST, RHONDA		IPP	DISTRIBUTED/LOCKED
10/16/2014	TEST, RHONDA		ADDENDUM	LOCKED/ADDENDUM
3/24/2014	TEST, RHONDA		ADDENDUM	LOCKED/ADDENDUM
3/08/2013	TEST, RHONDA		IPP	DISTRIBUTED/LOCKED

For the smoothest process, enter S-IPP and S-IPA reports in chronological order.

- Completing reports one by one keeps everything on track and easy to manage!

ENSURE REPORTS ARE DISTRIBUTED AND LOCKED

Date	Written By	Add New Report	Document	Status
1/03/2025	DINDIMAN, MELISSA		SIPP	NEW IPP
3/30/2022	TEST, JANE		PCT IPP	DISTRIBUTED/LOCKED
4/23/2019	TEST, JANE		IPP	DISTRIBUTED/LOCKED
3/09/2016	TEST, RHONDA		IPP	DISTRIBUTED/LOCKED
10/16/2014	TEST, RHONDA		ADDENDUM	LOCKED/ADDENDUM
3/24/2014	TEST, RHONDA		ADDENDUM	LOCKED/ADDENDUM
3/08/2013	TEST, RHONDA		IPP	DISTRIBUTED/LOCKED

DISTRIBUTED/LOCKED

Remember, all previous reports need to be locked and distributed before creating a new one.

- The system will prevent you from report creation if the last one is still pending final locking/distribution.

RETROACTIVE REPORTS BETWEEN LOCKED ENTRIES

Client # TEST20
Date of Birth 09/12/1994
IPP Frequency A

New IPP required to be dated after latest IPP related document.

IPP Date: 01/01/2022
Written by: DINDIMAN, MELISSA
Next IPP End: 01/01/2024

For Retrospective IPPs (Created on or after 01/01/2024):
☒ First Person IPP
☐ Third Person IPP
☐ Follow up Meeting (if any)

New IPP required to be dated after latest IPP related document.

Retrospective reports cannot be inserted between two already distributed/locked reports.

- This is why it's important to keep reports chronological order - it helps maintain accurate records for the individual!

Representation and Inclusion

FOUNDATIONAL DATA UPDATE

Foundational Data has been updated to include important questions about preferred names, sexual orientation, and gender identity (SOGI) - helping users to capture information and respect the identity preferences of the individuals we serve.

Birth Date Age 009

Birth Place

Client Language ENGLISH

Care Taker Language ENGLISH

Gender/Identity

From the Primary Client Record, questionnaires can be accessed by clicking on the icon next to Gender/Identity.

Gender/Identity

Client: TEST, NAME, SURNAME, BIRTH DATE: 01/01/2016

Foundational Data: Gender and Identity

Questions and Answers

What are the names you prefer to use?

What are your pronouns?

What are the names you prefer to use?

To edit/update answers, click on the icon.

Questions inquire about preferred names, pronouns, sexual orientation, and gender identity.

Client: TEST, NAME, SURNAME, BIRTH DATE: 01/01/2016

Foundational Data: Gender and Identity

Questions and Answers

What are the names you prefer to use?

What are your pronouns?

What are the names you prefer to use?

What are your pronouns?

What are the names you prefer to use?

What are your pronouns?

Select answers by clicking the boxes next to the options; a ☒ will appear to confirm the selection.

Once complete, save your answers by clicking the button.

Click on to exit back to the list of questions and review.

Client # 1121

Last Legal: SANDIS Preferred: SANDIS

First: SANDY

MI: A

Birth: 01/01/2016

Aliases: SAN

Last Updated: 5/06/2025

Sex FEMALE She/Her

Marital Status SINGLE

Legal Status OTHER

Ethnicity/Race White

Preferred name, pronouns, sex, and gender identity responses are now displayed directly on the client's primary record - ensuring respectful and informed interactions at every step.

Need Help or Have Questions?



We're here to support you as you navigate these updates.

For any questions, technical assistance, or suggestions on what you want to see in SANDIS, please contact our support team at: help@sandis.org

SANDIS 8.6

PEOPLE WHO LISTEN. SOLUTIONS THAT WORK.



BOARD REPORT

Date: August 5, 2025

To: Board of Directors

From: Pamela Starmack, Director of Marketing & Communications

RE: Marketing & Communications Report

SOCIAL MEDIA

June highlights:

Facebook Reels interactions: 129% increase
Instagram engagement: 51% increase
LinkedIn engagement: 13% increase

Our best performing Reel: SDRC Game Day (FB and IG):
57,000 views, 213 likes, 16 comments, 33 shares

Game Day Comments:

@caldds: We ❤️ service coordinators! This team looks ready for an amazing day supporting your community. 🎉

@ryanbigelow: You guys don't receive enough recognition! Thank you for what you guys do!

Biggest highlight to date:

The Meet Austin Reel on Instagram has reached over **1 million views**, 44,700 likes, 1,000+ comments, and 10,900 shares. **AND** we gained over 4,000 followers on Instagram.

We now have 6,377 followers, and our views continue to grow!

April 2025



May 2025

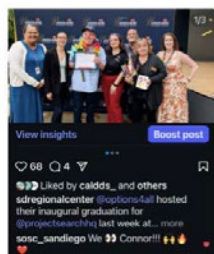


June 2025

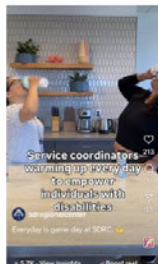




Instagram Top Posts (most engagement)



Standard Post:
LegoLand Graduation



Reel:
Game Day at SDRC



Story:
TMI Open House



LinkedIn Top Posts (most engagement)



SDRC Pride



Options for All: LegoLand Graduates



**Adopt-A-Family
25th Anniversary**



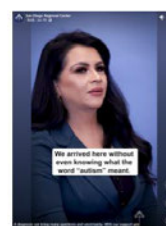
Facebook Top Posts (most engagement)



Standard Post:
SDRC Pride



Standard Post:
DDS Repost
(Protecting Access to Services and Supports for ALL Californians)



Reel: Ramon's Parents

ADVERTISING

Digital Ad Campaigns with Feathr – Services and Career Opportunities

Summary - ad performance from Sept 7, 2024, to July 28, 2025

Total views to date: 808,058

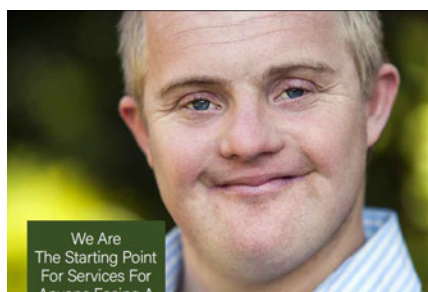
1. We're Hiring Ads

	Audience Reach	Clicks
English	7,731	102
Tagalog	6,486	112
Spanish	5,344	81
Farsi	362	69
Chinese	7,475	85
Arabic	569	63
Vietnamese	2,080	102

2. Services Ads

Vietnamese	1,053	47
English	8,065	59
Tagalog	7,640	57
Spanish	5,958	56
Farsi	536	32
Chinese	8,274	53
Arabic	838	37

Giving Back Magazine - July



We Are
The Starting Point
For Services For
Anyone Facing A
Developmental
Disability.

Give us a call at
(858) 576-8383
Se habla español



At the San Diego Regional Center, we provide support and services based on each person's desires and needs to not just persevere but truly thrive and build a life of their choosing.

We are committed to helping you every step of the way. Our core services include assessments, Individual Program Plans (IPP) or Individual Family Service Plan, service coordination, purchase of services, and community services. Call us or visit our website and apply online.

Serving over 45,000 people in San Diego and Imperial Counties.



www.sdrc.org

New Brochure - Employment First

Employment First is the belief that everyone, regardless of ability, deserves the chance to work in the community and earn a competitive wage. This includes people with intellectual and developmental disabilities.

Competitive Integrated Employment (CIE) means having a real job in an inclusive setting, with equal pay and benefits.

For adults 18 and older who want to work, CIE should be considered the first and best option. This approach supports independence, visibility in the workforce, and full community participation.

When planning with your Service Coordinator, employment will be explored as a meaningful and real choice. Your coordinator can help connect you with the right services and supports to achieve your work goals.

Contact Information

Michelle Flores
Employment Services Resource Coordinator
Community Services Department
■ Michelle.Flores@sdrc.org
☎ 858-576-2949

Warisa Chulindra
Employment Services Resource Coordinator
Community Services
■ Warisa.Chulindra@sdrc.org
☎ 858-503-4460

Saralynn Keenan
Program Manager
Community Services
■ Saralynn.Keenan@sdrc.org
☎ 858-496-4380

Office Locations

MAIN OFFICE
4355 Ruffin Rd, Suite 200
San Diego, CA 92123
(858) 576-2996

NORTH COUNTY
300 Rancheros Drive, 4th Floor, Suite 400
San Marcos, CA 92069
(760) 735-1200

EAST COUNTY
7787 Alvarado Road
La Mesa, CA 91942
(619) 596-1000

SOUTH BAY
2727 Hoover Avenue, Suite 100
National City, CA 91950
(619) 336-6600

IMPERIAL VALLEY
3095 Imperial Avenue
El Centro, CA 92243
(760) 355-8383

CARMEL MOUNTAIN
15015 Avenue of Science, Suite 250
San Diego, CA 92128
(858) 924-8700

SOUTH INLAND
2300 Boswell Road, Suite 200
Chula Vista, CA 91914
(619) 489-3200



Employment First



SDRC
San Diego Regional Center
www.sdrc.org

Welcome One Sheet for Intake Packets

Welcome to The San Diego Regional Center

We serve and empower persons with developmental disabilities and their families to achieve their goals with community partners.

Apply for CA Early Start Services
(Infants and toddlers ages 0-36 months)

Your request for service starts with a phone call to SDRC or our family support liaison at Exceptional Family Resource Center (EFRC), who will explain the program and gather information about your child during the call. If your child is turning 3 within 45 days, complete the online application for SDRC Services. Learn more about CA Early Start by scanning the QR code.

SDRC: 858-496-4318 or email at EStart@sdrc.org
EFRC: 619-594-7818 or email at efrc@sdrc.org

EARLY START PACKET

Apply for SDRC Services (also called Lanterman Services)
(For ages 3 and older)

If your child is turning 3 within 45 days, complete the application for SDRC Services. Scan the QR code and apply by completing the online Initial Contact Form based on the applicant's age. Once sign and submit, the application will be routed to an Intake Coordinator who will contact you within 15 working days for more information. The intake team will then review the applicant's information. If you or your child are deemed appropriate for an assessment, an Intake Coordinator will be assigned to your case and contact you to schedule an interview.

APPLY NOW

A Guide to California's Regional Center Services System

This guide, from The Department of Developmental Disabilities, explains how to get services from a regional center. It is helpful for people applying for regional center services, individuals already receiving services, parents or guardians, and other caregivers. The goal is to help you understand how to access the services and supports that are available. You'll find information about the law, how the regional center system works, the types of services offered by both the regional center and the community, and your rights and eligibility for these services.

LEARN MORE

Intake Brochure

To receive services, individuals must first qualify through the intake process, where we determine if the applicant meets the eligibility conditions of a developmental disability.

LEARN MORE

Eligibility Brochure

We determine eligibility and help plan, access, coordinate, and monitor the services and supports needed because of a developmental disability.

LEARN MORE

Services Brochure

SDRC is a starting point for coordinating services for you or your loved one with developmental and intellectual disabilities.

LEARN MORE

Early Start Brochure

California's early intervention program for infants and toddlers with developmental delays or at risk for having a developmental disability.

LEARN MORE

STAFF ENGAGEMENT

Disability Pride Month contest!

40 staff participated.

“In July, we celebrate individuals with disabilities and the 25th anniversary of the Americans with Disabilities Act (ADA) being signed into law (but we also do that year-round at SDRC). This year's theme, selected by The Arc, is: “We Belong Here, and We're Here to Stay.” You can learn more about Disability Pride Month here.

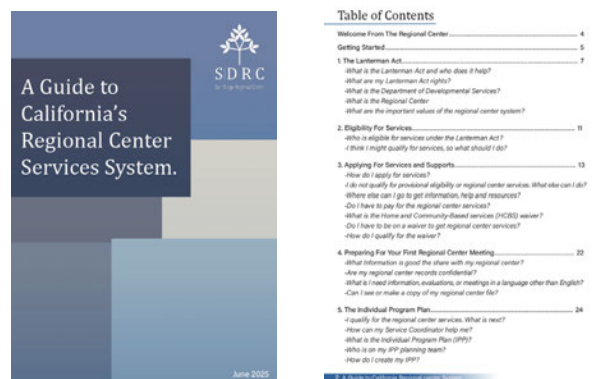
To celebrate, we're inviting you to submit a Mission Moment for a chance to win a \$50 Amazon gift card! 🎁”

Here are a few of the submissions.

1. “When working with a client's elderly parents during an annual visit, they shared a very vulnerable moment with me. Sharing their fear of passing & not knowing what would happen to their son. I was able to share that SDRC is a cradle-to-grave agency that will always support our clients, even when they no longer have any living family members & that we could plan for when they do pass. I saw with just creating this plan, they felt comforted & prepared, their worries were no longer based on if their son will continue to receive care.”
2. “A family once came to me, because they exhausted all options for day programs for their daughter. Nothing seemed to be a right fit for her. I called a few places that I knew, and a vendor accepted her right away. The family was so relieved and thankful for my help in finding a placement. A couple months later, the client is thriving in that day program and the parents are over the moon. I was thrilled to be able to help a family when they had no hope. This is why I do what I do!”
3. “One mission moment that continues to stay with me is the journey of a young adult client and his family who came to SDRC completely unfamiliar with our services. They were overwhelmed, unsure of what to expect, and trying to navigate a system that felt foreign and intimidating. Their very first IPP meeting stretched over three hours as we carefully walked through every support available, answering questions and building trust. My client was quiet and reserved—he had verbal ability but spoke very little, often deferring to his parent. You could sense that confidence was something he hadn't yet found in himself. Together, we explored different paths that might help him feel empowered. Eventually, he enrolled in Project SEARCH at LEGOLAND. Over time, I watched him transform. With support and structure, he started developing not only job skills, but a growing belief in his own abilities. I'll never forget the day I learned he had been offered a permanent position at LEGOLAND. But even more impactful than that job offer was the way he began to carry himself—smiling more, greeting others first, and showing pride in his accomplishments. Seeing that kind of growth reminds me why this work matters. It's not just about connecting individuals to services, it's about opening doors to confidence, independence, and a sense of purpose. Moments like this one ground me in the heart of our mission.”

Please let me know if you care to read all 40 responses.

In the works: A Guide to California's Regional Center Services System booklet is being developed from the DDS online presentation. The booklet will be included in the intake packets and available to others.





San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdr.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

SDICDSI FINANCE COMMITTEE MEETING
Tuesday, August 12, 2025
Balboa Suite 300 Conference Room and via Zoom
11:00 a.m.

AGENDA

1. Call to Order
2. Action Items
 - a. Approval of Minutes (Attached – Action Item)
-June 10, 2025, Finance Committee Meeting.
3. Informational Items
 - a. Overview of Purchase of Service Contracts (Attached – Information Item)
-*See the attached list of twelve (12) provider contracts.*
 - b. Fiscal Year 2024/2025 Purchase of Services (POS) Monthly Status Report.
(Attached – Information Item)
 - c. Fiscal Year 2024/2025 Operations (OPS) Spending Plan Reports.
(Attached – Information Item)
4. Old Business/New Business
5. Adjourn

Committee Members:

Virginia Bayer
James Gonzalez
Chris Hodge

Yasuko Mason
Matt Storey (Chair)
Wade Wilde (Community Representative)



San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdrc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

SDICDSI FINANCE COMMITTEE MEETING MINUTES

Tuesday, June 10, 2025

Balboa Suite 300 Conference Room and via Zoom

11:00 a.m.

Members Present: James Gonzalez, Dave Hadacek, Chris Hodge, Yasuko Mason, Matt Storey, Wade Wilde

Members Absent: Virginia Bayer

Staff Present: Mark Klaus, Kate Kinnamont, Miguel Larios, Dulce Morin, Brian Uribe, Robert Webb-Rex

Guests Present: Norma Ramos, Tessie Bradshaw

The meeting of the Finance Committee of the San Diego-Imperial Counties Developmental Services, Inc. (SDICDSI) was called to order at 11:00 am by Yasuko Mason, Committee Member.

1. **Approval of Minutes:** The draft minutes of the May 13, 2025, Finance Committee meeting were approved.
2. **Approval of Purchase of Service Contracts:** The committee discussed approving the four (4) purchase of services contracts presented to the Board. Three (3) additional contracts not needing board approval were discussed.

M/S/C to recommend that the Board of Directors approve the four (4) purchase of services contracts presented to the Board.

3. **DDS Directive on Regional Center Governing Board Approval on Contracts:** The committee reviewed the May 22, 2025, DDS directive regarding contracts needing board approval. Those contracts that do not meet the guidelines outlined in the directive will still be presented to the board for informational purposes.

4. **Fiscal Year 2025/2026 Regional Center B-1 Allocation Contract:** Dulce Morin reviewed the Fiscal Year 2025/2026 Regional Center B-1 Allocation Contract. The B-1 allocation funds are needed in the bank to meet the purchase of service and operations obligations to our staff and vendors. The B-1 advance is paid to regional centers in three installments. SDRC will receive \$79,604,647 for each installment for a total payment of \$238,813,942.

M/S/C to recommend that the Board of Directors approve the Fiscal Year 2025/2026 Regional Center B-1 contract amendment presented to the Board.

5. **Fiscal Year 2024/2025 Purchase of Services (POS) Monthly Status Report:** Dulce Morin reviewed the FY 2024/2025 POS spending plan. Actual POS expenditures through April 30, 2025, were \$681,715,514. Total projected POS expenditures are \$884,750,590. The projected POS surplus for FY 24/25 is \$13,805,834.
6. **Fiscal Year 2024/2025 Operations Spending Plan Report:** Dulce Morin reviewed the FY 2024/2025 Operations (OPS) spending plan. The net total projected expenditures are \$124,927,100. Net OPS expenditures through April 30, 2025, were \$77,483,556. The FY 2024/2025 OPS spending plan is projected to be balanced at fiscal year-end.
7. **Adjourn:** There being no further business, the Finance Committee meeting was adjourned at 11:50 am.

Matt Storey
Finance Committee Chair

c: Dave Hadacek
Mark Klaus

**San Diego Regional Center
Fiscal Status Report Summary
For the Twelve Month Period Ending June 30, 2025**

	FY 2024/2025 A-2 Allocation & ICF SPA	Projected FY 2024/2025 Expenses	Surplus (Deficit)
<u>Purchase of Services (POS)*</u>			
Client Services	\$ 899,556,424 *	\$ 886,325,173	\$ 13,231,251
Community Placement Plan	4,300,000	4,300,000	-
Total POS	<u>903,856,424</u>	<u>890,625,173</u>	<u>13,231,251</u>

Operations Spending Plan

A- Preliminary Contract	\$ 70,471,970		
A-1 Contract Amendment	52,777,068		
A-2 Contract Amendment	1,678,062		
Total Operations Allocation	<u>\$ 124,927,100</u>	<u>124,927,100</u>	<u>-</u>

**Total Allocation as of the A-2 &
Intermediate Care Facility- State
Plan Amendment (ICF SPA)**

\$ 1,028,783,524	\$ 1,015,552,273	\$ 13,231,251
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Purchase of Service Allocation & ICF SPA Reconciliation

A-Preliminary Contract	\$ 604,283,502
A-1 Contract Amendment	\$ 201,072,772
A-2 Contract Amendment	\$ 79,200,150
add: ICF SPA Reimbursement	<u>15,000,000</u>
Total Purchase of Service Allocation	<u>\$ 899,556,424 *</u>

San Diego Regional Center
Purchase of Service Monthly Status Report
For the Twelve Month Period Ending June 30, 2025

	A FY2024/2025 A-2 Allocation	B FY2024/2025 Expenditures 06/30/2025	C Projected Expenditures Remaining	B+C Total Projected Expenditures FY 2024/2025	A-(B+C) + / -
Client Services					
Out of Home	\$ 270,091,300	\$ 259,618,174	\$ 7,919,558	\$ 267,537,732	\$ 2,553,568
Day Activity	184,690,883	181,637,388	2,083,624	183,721,012	969,871
Habilitation	19,230,237	17,870,611	761,649	18,632,260	597,977
Medical Services	15,444,175	13,253,710	1,328,534	14,582,244	861,931
Non-Med Services	52,398,895	50,743,256	591,153	51,334,409	1,064,486
Support Services	99,684,433	93,265,756	5,497,557	98,763,313	921,120
Early Childhood	37,731,260	31,952,213	4,270,375	36,222,588	1,508,672
Transportation	39,558,729	30,575,860	7,229,264	37,805,124	1,753,605
Other	180,726,512	161,575,489	16,151,002	177,726,491	3,000,021
Total Purchase of Services (POS)	899,556,424	840,492,457	45,832,716	886,325,173	13,231,251
less: ICF/SPA POS Reimbursements	(15,000,000)	(14,602,930)	(397,070)	(15,000,000)	-
Net Balance (A-2)	<u><u>\$ 884,556,424</u></u>	<u><u>\$ 825,889,527</u></u>	<u><u>\$ 45,435,646</u></u>	<u><u>\$ 871,325,173</u></u>	<u><u>\$ 13,231,251</u></u>
CPP					
CPP POS Expenses	<u><u>\$4,300,000</u></u>	<u><u>\$615,887</u></u>	<u><u>\$3,684,113</u></u>	<u><u>\$4,300,000</u></u>	<u><u>\$ -</u></u>
Total CPP (A-2)	<u><u>\$100,000</u></u>	<u><u>\$615,887</u></u>	<u><u>\$3,684,113</u></u>	<u><u>\$4,300,000</u></u>	<u><u>\$ -</u></u>

San Diego Regional Center
Fiscal Year 2024/2025 Operations Spending Plan
For the Twelve Month Period Ending June 30, 2025

	<u>Spending Plan</u>	<u>Expended YTD (06/30/2025)</u>	<u>Projected Expenditures Remaining</u>	<u>Total Projected Expenditures</u>
Personnel				
Salaries	\$ 73,149,523	\$ 66,149,251	7,000,272	\$ 73,149,523
Fringe Benefits	22,082,333	16,927,591	5,154,742	22,082,333
Temporaries	711,229	531,239	179,990	711,229
Subtotal Personnel	<u>95,943,085</u>	<u>83,608,081</u>	<u>12,335,004</u>	<u>95,943,085</u>
General Expense				
General Exp, Supplies & Tech	2,547,448	1,152,515	1,394,933	2,547,448
General Maint. & Construction	2,264,713	78,104	2,186,609	2,264,713
Equipment Purchases	2,985,031	4,355	2,980,676	2,985,031
Information Technology	3,616,259	1,484,569	2,131,690	3,616,259
Building Services	1,484,319	817,822	666,497	1,484,319
Postage	336,913	312,298	24,615	336,913
Utilities	2,302,596	1,699,236	603,360	2,302,596
Printing	28,307	-	28,307	28,307
Accounting/Audit/Tax Fees	60,000	-	60,000	60,000
LOC Expenses	-	-	-	-
Tuition Reimbursement	610,000	-	610,000	610,000
Policy/Projects/Miscellaneous	3,268,497	991,593	2,276,904	3,268,497
Subtotal General Expense	<u>19,504,084</u>	<u>6,540,492</u>	<u>12,963,592</u>	<u>19,504,084</u>
Rent	6,753,510	6,035,522	717,988	6,753,510
Contracts				
Consultant Services	887,810	818,335	69,475	887,810
Equipment Rental	279,491	221,881	57,610	279,491
Subtotal	<u>1,167,301</u>	<u>1,040,216</u>	<u>127,085</u>	<u>1,167,301</u>
Other Expenses				
ARCA Expenses/Dues	198,824	173,581	25,243	198,824
Legal	929,379	493,366	436,013	929,379
Insurance	1,099,946	647,644	452,302	1,099,946
Travel	650,274	582,999	67,275	650,274
Board of Directors	82,006	65,672	16,334	82,006
Staff Training	98,176	74,614	23,562	98,176
Community Training	25,000	-	25,000	25,000
Public Information	25,000	5,000	20,000	25,000
Subtotal	<u>3,108,605</u>	<u>2,042,876</u>	<u>1,065,729</u>	<u>3,108,605</u>
Total Operating Expenses	126,476,584	99,267,187	27,209,397	126,476,584
Interest/Other Revenues	(1,357,332)	(1,173,269)	(184,063)	(1,357,332)
ICF SPA Service Fees Earned	<u>(192,152)</u>	<u>(190,654)</u>	<u>(1,498)</u>	<u>(192,152)</u>
Net Operating Expenses	<u>124,927,100</u>	<u>\$ 97,903,264</u>	<u>\$ 27,023,836</u>	124,927,100
A-2 OPS Allocation				<u>\$ 124,927,100</u>
Projected FY2024/2025 Spending Plan Surplus/(Deficit)				<u>\$ -</u>

**San Diego Regional Center
Operations Spending Plan Comparison Report
For the Period Ending June 30, 2025**

	YEAR-TO-DATE ACTUAL EXPENDITURES COMPARISON		FISCAL YEAR PROJECTED EXPENDITURES COMPARISON	
	Current Year Expenses through (06/30/2025)	Prior Year Expenses through (06/30/2024)	FY2024/2025 Total Projected Expenses	FY2023/2024 Total Expenses (estimated)
Personnel				
Salaries	\$ 66,149,251	57,674,525	\$ 73,149,523	\$ 63,335,579
Fringe Benefits	16,927,591	12,584,590	22,082,333	22,167,453
Temporaries	531,239	439,558	711,229	576,000
Subtotal Personnel	83,608,081	70,698,673	95,943,085	86,079,032
General Expense				
General Exp, Supplies & Tech	1,152,515	4,083,135	2,547,448	4,600,000
General Maint. & Construction	78,104	1,404,758	2,264,713	2,000,000
Equipment Purchases	4,355	956,341	2,985,031	1,551,103
Information Technology	1,484,569	752,679	3,616,259	1,447,379
Building Services	817,822	518,756	1,484,319	600,000
Postage	312,298	191,178	336,913	206,000
Utilities	1,699,236	196,695	2,302,596	230,000
Printing	-	27,483	28,307	54,500
Accounting/Audit/Tax Fees	-	5,750	60,000	76,300
LOC Expenses	-	-	-	-
Tuition Reimbursement	-	-	610,000	-
Policy/Projects/Miscellaneous	991,593	1,082,092	3,268,497	1,303,996
Subtotal General Expense	6,540,492	9,218,867	19,504,084	13,459,670
Rent	6,035,522	6,914,546	6,753,510	7,595,500
Contracts				
Consultant Services	818,335	230,884	887,810	1,426,000
Equipment Rental	221,881	273,637	279,491	463,250
Subtotal	1,040,216	504,521	1,167,301	2,014,250
Other Expenses				
ARCA Expenses/Dues	173,581	158,824	198,824	160,000
Legal	493,366	611,048	929,379	747,487
Insurance	647,644	911,948	1,099,946	993,570
Travel	582,999	552,642	650,274	674,500
Board of Directors	65,672	79,617	82,006	85,000
Staff Training	74,614	17,649	98,176	38,000
Community Training	-	-	25,000	25,000
Public Information	5,000	75	25,000	25,000
Subtotal	2,042,876	2,331,803	3,108,605	2,748,557
Total Operating Expenses	99,267,187	89,668,410	126,476,584	111,897,009
Interest/Other Revenues	(1,173,269)	(1,653,233)	(1,357,332)	(1,774,268)
ICF SPA Service Fees Earned	(190,654)	(185,689)	(192,152)	(184,776)
Net Operating Expenses	\$ 97,903,264	87,829,488	\$ 124,927,100	\$ 109,937,965

7/31/2025 15:56



San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdrc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

Memorandum

DATE: August 5, 2025
TO: Board of Directors
FROM: Dulce Morin
RE: Contracts for Board Review

There are no service provider contracts requiring board approval this month. We have attached summary sheets for the service provider contracts that have recently been approved. These summary sheets are for information purposes only.

New or Revised Contracts

HQ2287	50th Street Care DBA J&A DreamCare, Inc.
HQ2302	Andasol Board and Care
HQ2288	Best Care2U
HQ2251	Five Star Freedom Living, Inc.
HQ2276	Janna Residential
HQ2262	Sunny Side Care
HQ2289	Sunrise Care by Katya
HQ2261	Valley Care Home #1

Renewals

HQ1924	Activus Transportation
HQ2254	New Beginnings #1
HQ0779	Sunny Delight Home Care
HQ2221	Ximena Day Program

Contract Summary for Board of Directors Review/Approval

1	Provider Name (name facility or program): Address:	50 th Street Care DBA J&A DreamCare, inc. 1495 50 th St. San Diego, CA 92102
2	Vendor #:	HQ2287
3	Type of Program/level:	Adult Residential Facility
4	Scope of Work/Program Design:	This is a Level 6 home that serves individuals with severe behavior challenges. They provide Behavior Consultation, enriched staffing, and awake overnight staff.
5	Program Capacity:	License capacity 6; 6 private bedrooms
6	Rate (hourly/daily/monthly):	\$13,016.06 per client per month less current SSI
7	Total Potential Compensation:	\$13,016.06– \$1,420.07 (SSI)=\$11,595.99 x 6 (clients) =\$69,575.94 (monthly) x 60 (months) =\$4,174,556.40
8	Term of Contract:	August 15, 2025- August 14, 2030
9	Date of Initial Vendorization:	TBD
10	Significant Changes from Previous Contract:	New Vendorization

Contract Summary for Board of Directors Review/Approval

1	Provider Name (name facility or program): Address:	Andasol Board and Care 7610 Andasol St. San Diego, CA 92126
2	Vendor #:	HQ2302
3	Type of Program/Level:	Adult Residential Facility Level 3
4	Scope of Work/Program Design:	Staff operated facility serves individuals with two self-help deficits two behavioral challenges, or are non-ambulatory and provides a 1:3 staff ratio
5	Program Capacity:	4; 2 shared rooms
6	Rate (hourly/daily/monthly):	\$8,320.47 per client per month less current SSI
7	Total Potential Compensation:	\$8,320.47 – \$1,420.07 (SSI)=\$6,900.40 x 4 (clients) =\$27,601.60 (monthly) x 60 (months) =\$1,656,096.00
8	Term of Contract:	August 15, 2025 – August 14, 2030
9	Date of Initial Vendorization:	TBD
10	Significant Changes from Previous Contract:	New vendorization

Contract Summary for Board of Directors Review/Approval

1	Provider Name (name facility or program): Address:	Best Care2U 1061 Fountain Pl. Escondido, CA 92026
2	Vendor #:	HQ2288
3	Type of Program/level:	Adult Residential Facility Level 6 and IMS approved for individuals with restricted health conditions
4	Scope of Work/Program Design:	This is a Level 6 home that serves individuals with severe behavior challenges. They provide Behavior Consultation, enriched staffing, and wake overnight staff. They are also IMS approved.
5	Program Capacity:	4; 4 private rooms
6	Rate (hourly/daily/monthly):	\$13,533.59 per client per month less current SSI
7	Total Potential Compensation:	\$13,533.59– \$1,420.07 (SSI)=\$12,113.52 x 4 (clients) =\$48,454.08 (monthly) x 60 (months) =\$2,907,244.80
8	Term of Contract:	August 15, 2025-August 14, 2030
9	Date of Initial Vendorization:	TBD
10	Significant Changes from Previous Contract:	New Vendorization

Contract Summary for Board of Directors Review/Approval

1	Provider Name:	Five Star Freedom Living, Inc. 434 Feghali Road Ramona, CA 92065
2	Vendor #:	HQ2251
3	Type of program:	Supported Living Services
4	Scope of Work/Program Design:	The services provided by this agency support adults with developmental disabilities to live in their own homes (properties which the individual controls and rents or owns and which is not the residence of the parent), participate in community activities, assist in exploring their interests, and live lives that are integrated. These services and supports are patterned differently for each person. The range of supported living services and supports available include, but are not limited to, assessment of consumer needs; assistance in finding, modifying and maintaining a home; facilitating circles of support to encourage the development of unpaid and natural supports in the community; advocacy and self-advocacy facilitation; development of employment goals; social, behavioral, and daily living skills training and support; development and provision of 24-hour emergency response systems; securing and maintaining adaptive equipment and supplies; recruiting, training, hiring and scheduling individuals to provide personal care and other assistance, including in-home supportive services workers, and facilitating community participation.
5	Program capacity:	60 Individuals
6	Rate (hourly/daily/monthly):	The rate for this agency is \$40.73 per client per hour for 1:1 services and \$22.75 per client per hour for 1:2 services. Funding for the initial assessment, the initial support plan, and the processes needed to set up services for an individual (finding an apartment, purchasing furnishings and household supplies, interviewing and training the initial support staff, etc.) are \$40.73 per hour.
7	Total potential compensation:	\$40.73 per hour x 250 hours in a month = \$10,182.50 per month X 60 clients = \$610,950 per month X 60 months = \$36,657,000 total potential compensation.
8	Term of Contract:	June 19, 2025 – June 18, 2030
9	Date of Initial Vendorization:	TBD
10	Significant changes from previous contract:	N/A

Contract Summary for Board of Directors Review/Approval

1	Provider Name (name facility or program): Address:	Janna Residential 1144 St. George Dr El Cajon, CA 92019
2	Vendor #:	HQ2276
3	Type of Program/Level:	Adult Residential Facility Level 3
4	Scope of Work/Program Design:	Staff operated facility serves individuals with two self-help deficits two behavioral challenges, or are non-ambulatory and provides a 1:3 staff ratio
5	Program Capacity:	3; 3 private rooms
6	Rate (hourly/daily/monthly):	\$8,320.47 per client per month less current SSI
7	Total Potential Compensation:	$\$8,320.47 - \$1,398.07 \text{ (SSI)} = \$6,900.40 \times 3 \text{ (clients)} = \$20,701.20 \text{ (monthly)} \times 60 \text{ (months)} = \$1,242,072.00$
8	Term of Contract:	July 15, 2025 – July 14, 2030
9	Date of Initial Vendorization:	TBD
10	Significant Changes from Previous Contract:	New vendorization

Contract Summary for Board of Directors Review/Approval

1	Provider Name (name facility or program): Address:	Sunny Side Care 4647 Winona Avenue San Diego, CA 92115
2	Vendor #:	HQ2262
3	Type of Program/level:	Adult Residential Facility-staff operated
4	Scope of Work/Program Design:	This is a Level 6 home that serves individuals with severe behavior challenges. They provide Behavior Consultation, enriched staffing, and awake overnight staff.
5	Program Capacity:	License capacity 6; 6 private rooms
6	Rate (hourly/daily/monthly):	\$13,016.06 per client per month less current SSI
7	Total Potential Compensation:	\$13,016.06– \$1,420.07 (SSI)=\$11,595.99 x 6 (clients) =\$69,575.94 (monthly) x 60 (months) =\$4,174,556.40
8	Term of Contract:	July 15, 2025- July 14, 2030
9	Date of Initial Vendorization:	TBD
10	Significant Changes from Previous Contract:	New Vendorization

Contract Summary for Board of Directors Review/Approval

1	Provider Name (name facility or program): Address:	Sunrise Care by Katya 11615 Via Carlotta El Cajon, CA 92019
2	Vendor #:	HQ2289
3	Type of Program/level:	Adult Residential Facility
4	Scope of Work/Program Design:	This is a Level 6 home that serves individuals with severe behavior challenges. They provide Behavior Consultation, enriched staffing, and wake overnight staff.
5	Program Capacity:	4; 2 private, 1 shared room
6	Rate (hourly/daily/monthly):	\$13,533.59 per client per month less current SSI
7	Total Potential Compensation:	\$13,533.59– \$1,420.07 (SSI)=\$12,113.52 x 4 (clients) =\$48,454.08 (monthly) x 60 (months) =\$2,907,244.80
8	Term of Contract:	August 15, 2025-August 14, 2030
9	Date of Initial Vendorization:	TBD
10	Significant Changes from Previous Contract:	New Vendorization

Contract Summary for Board of Directors Review/Approval

1	Provider Name (name facility or program): Address:	Valley Care Home #1 2366 Highview Ln. Spring Valley, CA 91977
2	Vendor #:	HQ2261
3	Type of Program/Level:	Adult Residential Facility Level 3
4	Scope of Work/Program Design:	Staff operated facility serves individuals with two self-help deficits two behavioral challenges, or are non-ambulatory and provides a 1:3 staff ratio
5	Program Capacity:	4; 4 private rooms
6	Rate (hourly/daily/monthly):	\$8,320.47 per client per month less current SSI
7	Total Potential Compensation:	\$8,320.47 – \$1,420.07 (SSI)=\$6,900.40 x 4 (clients) =\$27,601.60 (monthly) x 60 (months) =\$1,656,096.00
8	Term of Contract:	July 15, 2025 – July 14, 2030
9	Date of Initial Vendorization:	TBD
10	Significant Changes from Previous Contract:	New vendorization

Contract Summary for Board of Directors Review/Approval

1	Provider Name:	Activus Transportation
2	Vendor #:	HQ1924
3	Type of Program:	875 Transportation Company
4	Scope of Work/Program Design:	The services provided by this agency supports adults with developmental disabilities in Central, South, and east County. Going to small pockets where other transporters are reluctant to go.
5	Program Capacity:	No Capacity Limits
6	Rate (hourly/daily/monthly):	\$37.50 per one way trip Ambulatory \$75.00 per one way trip Non-Ambulatory
7	Total Potential Compensation:	Estimated total compensation not to exceed \$683,055.51.
8	Term of Contract:	September 1, 2025 through August 31, 2030
9	Date of Initial Vendorization:	September 13, 2023
10	Significant Changes from Previous Contract:	Switched from regional center rate model to usual and customary rate due to serving non-SDRC clients as well (meets the 30% usual and customary rule).

Document1

Contract Summary for Board of Directors Review/Approval

1	Provider Name:	New Beginnings #1
2	Vendor #:	HQ2254
3	Type of Program:	880 Transportation Additional Component
4	Scope of Work/Program Design:	The services provided are for people who are attending their B-Mod program who may not be able to have their transportation needs met by other providers.
5	Program Capacity:	Program design indicates that the capacity is 45 people.
6	Rate (hourly/daily/monthly):	\$16.49 per trip rate for Ambulatory persons \$17.26 per trip rate for Non Ambulatory persons
7	Total Potential Compensation:	Five year estimated costs if full and Amb rate is \$1,024,029.00
8	Term of Contract:	July 15, 2025 through June 30, 2030
9	Date of Initial Vendorization:	June 12, 2025
10	Significant Changes from Previous Contract:	

Document1

Contract Summary for Board of Directors Review/Approval

1	Provider Name:	Sunny Delight Home Care
2	Vendor #:	HQ0779
3	Type of Program:	880 Additional Transportation Component
4	Scope of Work/Program Design:	The services provided by this agency supports adults with developmental disabilities, transporting the residents of their homes to various day programs.
5	Program Capacity:	Provider has two Residential Homes
6	Rate (hourly/daily/monthly):	\$16.49 per one way trip Ambulatory \$17.26 per one way trip Non-Ambulatory
7	Total Potential Compensation:	Estimated total compensation not to exceed \$249990.
8	Term of Contract:	August 1, 2025 through July 31, 2030
9	Date of Initial Vendorization:	December 15, 2008
10	Significant Changes from Previous Contract:	

Document1

Contract Summary for Board of Directors Review/Approval

1	Provider Name:	Xienna Day Program
2	Vendor #:	HQ2221
3	Type of Program:	880 Transportation Additional Component
4	Scope of Work/Program Design:	The services provided by this agency supports adults with developmental disabilities by transporting them to within the San Diego County area.
5	Program Capacity:	SDRC usually limits the number of individuals served by a transportation company to 300. This agency currently has capacity stated as 30 in their Program Design.
6	Rate (hourly/daily/monthly):	\$16.49 Per one way trip Ambulatory \$17.26 Per one way trip Non Ambulatory
7	Total Potential Compensation:	\$249,990
8	Term of Contract:	July 1, 2025 through June 30, 2030
9	Date of Initial Vendorization:	April 11, 2025
10	Significant Changes from Previous Contract:	



San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdrc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

SDICDSI AUDIT COMMITTEE MEETING
9449 Balboa Ave, Suite 300, and via Zoom
Tuesday, August 12, 2025
1:30 p.m.
AGENDA

1. Call to Order
2. Approval of Minutes (Action Item)
 - Audit Committee Meeting held on March 11, 2025 (attached)
3. Presentation: Fiscal Year 2024/2025 Audit Engagement Letter
 - Presented by Windes LLP
 - Tom Huey, Partner
 - AJ Hamon, Senior Manager
4. Committee discussion with Auditor
5. Adjourn

Committee Members:
Terri Colachis (Chair)
Pamela Ehlers
Wendy Forkas
Laura Oakes
Norma Ramos



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4355 Ruffin Road, San Diego, CA 92123
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Serving individuals with developmental disabilities in San Diego and Imperial Counties

SDICDSI AUDIT COMMITTEE MEETING MINUTES

Tuesday, March 11, 2025

9449 Balboa Ave, Suite 300, and via Zoom

1:30 p.m.

Members Present: Terri Colachis, Pam Ehlers, Wendy Forkas, Dave Hadacek, Laura Oakes

Members Not Present: Norma Ramos

Staff Present: Mark Klaus, Kate Kinnamont, Dulce Morin, Robert Webb-Rex

The meeting of the Audit Committee of the San Diego-Imperial Counties Developmental Services, Inc. (SDICDSI) was called to order at 1:26 pm by Terri Colachis, Audit Committee Chair.

1. **Approval of Minutes:** The draft minutes of the September 10, 2024, Audit Committee meeting were approved.
2. **Review of Auditor's Report and Financial Statements, June 30, 2024:** Windes staff, Tom Huey, and AJ Hamon presented to the committee the draft auditors' report and financial statements for Fiscal Year 2023/2024, covering the period from July 1, 2023, to June 30, 2024. The committee discussed approving the draft Auditors Report and Financial Statements for Fiscal Year 2023/2024.

M/S/C to approve the draft Auditors Report and Financial Statements for Fiscal Year 2023/2024.

3. **Adjourn:** There being no further business, the Audit Committee meeting was adjourned at 2:06 pm.

Terri Colachis
Audit Committee Chair

c: Dave Hadacek
Mark Klaus

July 18, 2025

To the Board of Directors and Management of
San Diego/Imperial Counties Developmental Services, Inc.
c/o Mr. Mark Klaus, Executive Director
4355 Ruffin Road, Suite 205
San Diego, California 92123

We are pleased to confirm our understanding of the services we are to provide for San Diego/Imperial Counties Developmental Services, Inc. for the year ended June 30, 2025.

Audit Scope and Objectives

We will audit the financial statements of San Diego/Imperial Counties Developmental Services, Inc. (the Center), which comprise the statement of financial position as of June 30, 2025, the related statements of activities, functional expenses, and cash flows for the year then ended, and the disclosures (collectively, the "financial statements"). Also, the following supplementary information accompanying the financial statements will be subjected to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America (GAAS), and we will provide an opinion on it in relation to the financial statements as a whole in a report combined with our auditor's report on the financial statements

1) Schedule of expenditures of federal awards.

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and issue an auditor's report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America, and to report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as whole. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment of a reasonable user made based on the financial statements. The objectives also include reporting on:

- Internal control over financial reporting and compliance with provisions of laws, regulations, contracts, and award agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.
- Internal control over compliance related to major programs and an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Single Audit Act Amendments of 1996 and Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).

Auditor's Responsibilities for the Audit of the Financial Statements and Single Audit

We will conduct our audit in accordance with GAAS; the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; the Single Audit Act Amendments of 1996; and the provisions of the Uniform Guidance, and will include tests of accounting records, a determination of major program(s) in accordance with Uniform Guidance, and

To the Board of Directors and Management of
San Diego/Imperial Counties Developmental Services, Inc.
July 18, 2025
Page 2

other procedures we consider necessary to enable us to express such an opinion. As part of an audit in accordance with GAAS and *Government Auditing Standards*, we exercise professional judgment and maintain professional skepticism throughout the audit.

We will evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management. We will also evaluate the overall presentation of the financial statements, including the disclosures, and determine whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the Center or to acts by management or employees acting on behalf of the Center. Because the determination of waste and abuse is subjective, *Government Auditing Standards* do not expect auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is an unavoidable risk that some material misstatements or noncompliance may not be detected by us, even though the audit is properly planned and performed in accordance with GAAS and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements or on major programs. However, we will inform the appropriate level of management of any material errors, any fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. We will include such matters in the reports required for a Single Audit. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Our communications with governance identifying significant risks of material misstatement as part of our audit planning will be communicated separately from this letter.

We will also conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Center's ability to continue as a going concern for a reasonable period of time.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts and direct confirmation of receivables and certain assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We may also request written representations from your attorneys as part of the engagement.

We may from time to time, and depending on the circumstances, use third-party service providers within or outside of the United States in serving your account. We may share confidential information about you with these service providers but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures, and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Furthermore, we will remain responsible for the work provided by any such third-party service providers.

Our audit of financial statements does not relieve you of your responsibilities.

Audit Procedures—Internal Control

We will obtain an understanding of the Center and its environment, including the system of internal control, sufficient to identify and assess the risks of material misstatement of the financial statements, whether due to error or fraud, and to design and perform audit procedures responsive to those risks and obtain evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentation, or the override of internal control. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

As required by the Uniform Guidance, we will perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with compliance requirements applicable to each major federal award program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. Accordingly, we will express no such opinion. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the Uniform Guidance.

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the Center's compliance with provisions of applicable laws, regulations, contracts, and agreements, including grant agreements. However, the objective of those procedures will not be to provide an opinion on overall compliance, and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

The Uniform Guidance requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with federal statutes, regulations, and the terms and conditions of federal awards applicable to major programs. Our procedures will consist of tests of transactions and other applicable procedures described in the *OMB Compliance Supplement* for the types of compliance requirements that could have a direct and material effect on each of the Center's major programs. For federal programs that are included in the Compliance Supplement, our compliance and internal control procedures will relate to the compliance requirements that the Compliance Supplement identifies as being subject to audit. The purpose of these procedures will be to express an opinion on the Center's compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance.

Responsibilities of Management for the Financial Statements and Single Audit

Our audit will be conducted on the basis that you acknowledge and understand your responsibility for (1) designing, implementing, establishing, and maintaining effective internal controls relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including internal controls over federal awards, and for evaluating and monitoring ongoing activities to help ensure that appropriate goals and objectives are met; (2) following laws and regulations; (3) ensuring that there is reasonable assurance that government programs are administered in compliance with compliance requirements; and (4) ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements, schedule of expenditures of federal awards, and all accompanying information in conformity with accounting principles generally accepted in the United States of America; and for compliance with applicable laws and regulations (including federal statutes), rules, and the provisions of contracts and grant agreements (including award agreements). Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information.

You are also responsible for making drafts of financial statements, schedule of expenditures of federal awards, all financial records, and related information available to us and for the accuracy and completeness of that information (including information from outside of the general and subsidiary ledgers); and for the evaluation of whether there are any conditions or events, considered in the aggregate, that raise substantial doubt about the Center's ability to continue as a going concern within one year after the date that the financial statements are available to be issued. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters; (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the Uniform Guidance; (3) additional information that we may request for the purpose of the audit; and (4) unrestricted access to persons within the Center from whom we determine it necessary to obtain audit evidence. At the conclusion of our audit, we will require certain written representations from you about the financial statements; schedule of expenditures of federal awards; federal award programs; compliance with laws, regulations, contracts, and grant agreements; and related matters.

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the Center involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the Center received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the Center complies with applicable laws, regulations, contracts, agreements, and grants. You are also responsible for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements.

that we report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings; promptly follow up and take corrective action on reported audit findings; and prepare a summary schedule of prior audit findings and a separate corrective action plan.

You are required to disclose in the financial statements the date through which subsequent events have been evaluated and whether that date is the date the financial statements were issued or were available to be issued. You agree that you will not date the subsequent event note earlier than the date of the management representation letter.

You are responsible for identifying all federal awards received and understanding and complying with the compliance requirements and for the preparation of the schedule of expenditures of federal awards (including notes and noncash assistance received, and COVID-19-related concepts, such as lost revenues, if applicable) in conformity with the Uniform Guidance. You agree to include our report on the schedule of expenditures of federal awards in any document that contains, and indicates that we have reported on, the schedule of expenditures of federal awards. You also agree to include the audited financial statements with any presentation of the schedule of expenditures of federal awards that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the schedule of expenditures of federal awards in accordance with the Uniform Guidance; (2) you believe the schedule of expenditures of federal awards, including its form and content, is stated fairly in accordance with the Uniform Guidance; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the schedule of expenditures of federal awards.

You are also responsible for the preparation of the other supplementary information, which we have been engaged to report on, in conformity with U.S. generally accepted accounting principles. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the Audit Scope and Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

To the Board of Directors and Management of
San Diego/Imperial Counties Developmental Services, Inc.
July 18, 2025
Page 6

You agree to notify us in advance of your intent to include our independent auditors' report and the audited financial statements within a published annual report or any other document. This allows us to perform the required procedures in accordance with professional standards and thus provide consent for the inclusion of our report in such a document. With regard to publishing the financial statements on your website, you understand that websites are a means of distributing information and, therefore, we are not required to read the information contained in those websites or to consider the consistency of other information on the website with the original document.

Other Services

We will prepare the Center's federal and state information returns for the year ended June 30, 2025 for the applicable jurisdictions based on information provided by you, which is covered in a separate engagement letter.

We will also assist in preparing the financial statements, schedule of expenditures of federal awards, and related notes of the Center in conformity with accounting principles generally accepted in the United States of America and the Uniform Guidance based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. We will perform the services in accordance with applicable professional standards, including the Statements on Standards for Tax Services issued by the American Institute of Certified Public Accountants. The other services are limited to the financial statements, schedule of expenditures of federal awards, related notes, and tax services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities. We will advise management with regard to tax positions taken in the preparation of the information return, but management must make all decisions with regard to those matters.

You agree to assume all management responsibilities for the tax services, financial statements, schedule of expenditures of federal awards, and related notes, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter the tax services provided and our assistance with preparation of the financial statements, the schedule of expenditures of federal awards, and related notes and that you have evaluated the adequacy of our services and have reviewed and approved the results of the services, the financial statements, the schedule of expenditures of federal awards, and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Engagement Administration, Fees, and Other

We will schedule the engagement based in part on deadlines, working conditions, and the availability of your key personnel. We will plan the engagement based on the assumption that your personnel will cooperate and provide assistance by performing tasks such as preparing requested schedules, retrieving supporting documents, and preparing confirmations. If, for whatever reason, your personnel are unable to provide the necessary assistance in a timely manner, it may substantially increase the work we have to do to complete the engagement within the established timeline, resulting in an increase in fees over our original fee estimate.

At the conclusion of the engagement, we will complete the appropriate sections of the Data Collection Form that summarizes our audit findings. It is management's responsibility to electronically submit the reporting package (including financial statements, schedule of expenditures of federal awards, summary schedule of prior audit findings, auditor's reports, and corrective action plan) along with the Data Collection Form to the Federal Audit Clearinghouse. We will coordinate with you the electronic

To the Board of Directors and Management of
San Diego/Imperial Counties Developmental Services, Inc.
July 18, 2025
Page 7

submission and certification. The Data Collection Form and the reporting package must be submitted within the earlier of 30 calendar days after receipt of the auditor's reports or nine months after the end of the audit period.

We will provide copies of our reports to the Center; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the property of Windes, Inc. and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to designated cognizant or oversight agencies, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Windes, Inc. personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date or for any additional period requested by a cognizant agency, oversight agency for audit, or pass-through entity, as applicable. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Tom Huey is the engagement partner and is responsible for supervising the engagement and signing the report or authorizing another individual to sign it. We expect to begin our audit on October 20, 2025.

We estimate that our fees for the audit and other services, other than the preparation of the information returns, will be \$61,500. The fee estimate is based on anticipated cooperation from your personnel, the understanding that your personnel will prepare all confirmations we request, will locate any documents selected by us for testing, the assumption that your personnel will provide timely and accurate information to ensure the engagement can be completed efficiently, and unexpected circumstances will not be encountered during the engagement. If additional time is necessary, we will keep you informed of any problems or delays we encounter, and our fee will be adjusted accordingly.

Our invoices for these fees will be rendered each month as work progresses and are payable on presentation.

Government Auditing Standards require that we provide you with a copy of our most recent external peer review report and any subsequent reports received during the contract period. Accordingly, our June 30, 2022 peer review report accompanies this letter.

To ensure that Windes, Inc.'s independence is not impaired under the AICPA Code of Professional Conduct, you agree to inform the engagement partner before entering into any substantive employment discussions with any of our personnel.

It is our policy to keep records related to this engagement for seven years. Windes, Inc. does not keep any original client records, so we will return these to you on or before the completion of the services rendered for the current engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies.

To the Board of Directors and Management of
San Diego/Imperial Counties Developmental Services, Inc.
July 18, 2025
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To learn more about the information we have collected from you, please visit our website at <https://windes.com/privacy-policy> and see our Privacy Policy.

To the extent we are required to respond to a subpoena, court order or other legal process related to legal matters involving the Center and/or pursuant to which records and/or information regarding the Center are sought, the Center hereby agrees to reimburse us for our professional fees and costs incurred as well as those charged and/or incurred by legal counsel and/or third parties on our behalf in responding to the same.

If any dispute arises between Windes and the Center each of us as parties to this engagement agreement hereby agree to attempt, in good faith, to settle disputes by mediation administered by the American Arbitration Association (AAA) under its Professional Accounting and Related Services Dispute Rules. Fees charged by any mediators, arbitrators or the AAA shall be shared equally by both parties.

If a dispute arises between Windes, Inc. and the Center regarding fees charged by Windes, Inc. to the Center, both parties hereby agree that such fee-related disputes will only be submitted to arbitration for resolution in accordance with the Professional Accounting and Related Services Dispute Rules of the AAA. Any hearing shall be before one arbitrator in accordance with the Professional Accounting and Related Services Dispute Rules and such arbitration shall be binding and final. By agreeing to arbitration as provided herein, we both acknowledge that in the event of a dispute over fees charged by Windes, Inc., each of us is giving up the right to have the dispute decided in a court of law before a judge or jury and instead we are accepting the use of arbitration for final resolution.

Reporting

We will issue written reports upon completion of our Single Audit. Our reports will be addressed to the audit committee of San Diego/Imperial Counties Developmental Services, Inc.. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add a separate section, or add an emphasis-of-matter or other-matter paragraph to our auditor's report, or if necessary, withdraw from this engagement. If our opinion is other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed an opinion, we may decline to express an opinion or issue reports, or we may withdraw from this engagement.

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will state that (1) the purpose of the report is solely to describe the scope of testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The Uniform Guidance report on internal control over compliance will state that the purpose of the report on internal control over compliance is solely to describe the scope of testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Both reports will state that the report is not suitable for any other purpose.

To the Board of Directors and Management of
San Diego/Imperial Counties Developmental Services, Inc.
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We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please return a signed copy to us.

Very truly yours,

Winder, Inc.

RESPONSE:

This letter correctly sets forth the understanding.

Acknowledged and agreed on behalf of San Diego/Imperial
Counties Developmental Services, Inc. by:

Management Signature

Title

Date

Governance Signature

Title

Date



Report on the Firm's System of Quality Control

February 22, 2023

To the Shareholders of Windes, Inc.
and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Windes, Inc. (the firm) in effect for the year ended June 30, 2022. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported on in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

Required Selections and Considerations

Engagements selected for review included an engagement performed under *Government Auditing Standards*, including an audit under the Single Audit Act and audits of employee benefit plans.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Windes, Inc. in effect for the year ended June 30, 2022, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Windes, Inc. has received a peer review rating of *pass*.

Erickson Krentel, LLP

Certified Public Accountants



San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdr.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

SDRC Legislative Committee
Tuesday, August 12, 2025 @ 10:00 a.m.
Suite 300

AGENDA

- 1) Call to Order Chris Hodge
- 2) Approval of June 10, 2025, Minutes Chris Hodge
- 3) Legislative Report Mark Klaus / Gabby Ohmstede
 - A. State Budget Updates
 - 2025 Trailer Bill Language Affecting Regional Centers (attached)
 - Budget Clean Up
 - B. Federal Updates
 - HR 1 – “One Big Beautiful Bill”
 - Impact on California – Federal Match, MCO Tax, Work Requirements, and...
 - C. ARCA Sponsored Legislation
 - AB 1172 (Nguyen) – [AB 1172](#)
 - Administration of Emergency Antiseizure Medications
 - Status: Read Second Time and Referred to Appropriation Committee (July 17)
 - SB 422 (Grayson) – [SB 422](#)
 - Workforce Development Board: Developmental Services
 - Status: Held in Committee and Under Suspense
 - ACR 55 (Gonzalez, Jeff) – [ACR 55](#)
 - ARC v. DDS: 40th Anniversary
 - Status: Chaptered May 5, 2025
 - D. Other Bills
 - SB 471 (Menjivar) - [SB 471](#)
 - Office of the Developmental Services Ombudsperson
 - The bill outlines the creation and duties of the Developmental Services Ombudsperson
 - Status: Referred to Appropriations Committee (July 11)
 - AB 49 – (Maratsuchi) - [AB 49](#)
 - Schoolsites: immigration enforcement
 - The bill further prohibits allowing immigration enforcement officials on school grounds without a valid ID, judicial warrant, court order, or urgent reasons. If these criteria are met, their access should be limited to areas without students
 - Status: Referred to Appropriations Committee (July 17)



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- AB 815 (Ortega) - [AB 815](#)
 - Vehicle insurance: vehicle classification
 - This bill states that a vehicle insured under an automobile liability policy cannot be classified as a common carrier, commercial vehicle, for-hire vehicle, permissive use vehicle, or livery solely because it is used to provide public social services or social service transportation.
 - Status: Referred to Appropriations Committee (July 10)

4) Upcoming Dates

- July 18 - Aug. 17 – Summer Recess
- Aug. 29 – Last day for second house fiscal committee
- Sept. 12 – Last day of session & Last day to Pass Bills
- Oct. 12 – Governor’s signing deadline
- January 5, 2026 – Legislature Reconvenes

5) Other Business

All

6) Adjourn

Chris Hodge



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Serving individuals with developmental disabilities in San Diego and Imperial Counties

SDICDSI Legislation Committee Meeting Minutes

Tuesday June 10, 2025

Suite 300 Conference Room and via Zoom

10:00am – 11:00am

Members Present: Norma Ramos, Erik Rascon, David Hadacek, Tessi Bradshaw, Yasuko Mason, Cali Williams, Chris Hodge and Wendy Forkas

Members Absent: Terri Colachis

Staff Present: Mark Klaus, Seth Mader and Gabby Ohmstede

Guests: Becky Williams

1) Call to Order:

- The meeting of the Legislation Committee of the San Diego-Imperial Counties Developmental Services, Inc (SDICDSI) was called to order at 10am by Chris Hodge, Legislation Committee Chair.

2) Approval of May 13, 2025 Minutes:

- Approved as presented

3) Legislative Report – Mark Klaus / Gabby Ohmstede

- State Budget
 - i. Senate/Assembly reached a deal; voted on this week; will be sent to Governor to be signed; things are moving fast
 - ii. Senate meets today at 2:30pm for vote only – no discussion
 - iii. Full Senate budget committee tomorrow – vote only
 - iv. Full Senate meets Thursday to finalize
 - v. Considered a ‘placeholder budget’ prior to summer recess and until more is known about federal level implications; an ‘extraordinary session’ is possible around September
 - vi. Prop 56 delayed (supplemental payments med/dental providers)
 - vii. Upheld QI program for providers related to EVV compliance, HCBS, and provider directory
 - viii. Moves forward hold harmless change from 6/30/26 to 2/28/26
 - ix. Rejects elimination of DSP program
- Federal Updates – no updates
- ARCA Sponsored Legislation
 - i. AB 1172 – hearings this week; needs to be passed by 9/12/25
 - ii. SB 422 – most likely ‘died’ due to cost implications
 - iii. ACR 55 – passed / unanimously supported



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Serving individuals with developmental disabilities in San Diego and Imperial Counties

- Other Legislation
 - i. AB 815 – discussion about purpose of bill; clarifies that those who occasionally transport shouldn't have to pay the insurance higher premium
- 4) Upcoming Dates (refer to Agenda)
- 5) Other Business
 - Cali shared that she called Assemblywoman LaShae-Collins and sang her Happy Birthday
- 6) Meeting adjourned at 10:35am

Minutes submitted by Gabby Ohmstede



State of California—Health and Human Services Agency
Department of Developmental Services
1215 O Street, Sacramento, CA 95814
www.dds.ca.gov



July 18, 2025

D-2025-Legislation-002

TO: REGIONAL CENTER EXECUTIVE DIRECTORS
REGIONAL CENTER BOARD PRESIDENTS

SUBJECT: 2025 TRAILER BILL LANGUAGE AFFECTING REGIONAL CENTERS

The purpose of this directive is to provide a summary of the 2025 Developmental Services Budget Trailer Bill, [AB 143 \(Chapter 12, Statutes of 2025\)](#) and the still-pending 2025 Social Services Trailer Bill, SB 119, which affects regional centers, state operated services and the developmental disabilities services system. The changes made by these bills became effective with their enactment, unless otherwise specified by the statute. While this letter provides a high-level summary, a complete and thorough review of the bills by regional centers is imperative for statutory compliance. Requirements and due dates for regional centers are included in this directive, to avoid the need for directives on individual topics. Below is a list of areas affected by, and/or new requirements resulting from these bills, and the sections of each bill where relevant statutory changes can be found:

- [Implicit Bias Training](#)
- [Rate Reform Hold Harmless Date & Quality Incentive Program Eligibility Requirements](#)
- [Eligibility for the Quality Incentive Program Rate Component](#)
- [Master Plan for Developmental Services](#)
- [Health and Safety Waiver Application Assistance](#)
- [Cost Effective Definition](#)
- [Self-Determination Program](#)
- [Tailored Day Program](#)
- [Parental Fee Program Repeal](#)
- [Employment Services](#)
- [Rates Updates](#)
- [Mandated Reporter Curriculum](#)

Implicit Bias Training

AB 143 Section 1: Welfare and Institutions Code Section 4511.1 was amended to make regional center implicit bias training subject to an appropriation by the Legislature. However, it is the intent of the Legislature for regional centers to continue to offer implicit bias training to the extent their resources allow.

Implementation: *The requirement for implicit bias training now is subject to an appropriation by the Legislature. The 2025 Budget Act includes no dedicated funding for the training. Therefore, regional centers are not required to provide this training until the Legislature*

appropriates funds in the future. Regional centers may offer the training if their resources allow.

Rate Reform Hold Harmless Date & Quality Incentive Program Eligibility Requirements

AB 143 Section 2: Welfare and Institutions Code Section 4519.10 was amended to change the expiration date of the hold harmless policy for providers whose rates exceed the rate model recommendations, from June 30, 2026, to February 28, 2026.

Implementation: Effective March 1, 2026, the rates for providers previously subject to the hold harmless provision will be adjusted to 100 percent of the posted rate model rate for those who earned the quality incentive payment, and 90 percent for all other providers. This adjustment will align provider rates within the same service category and region. The Department of Developmental Services (Department) issued [\(D-2025-Rate Reform-006\)](#) on July 2, 2025. Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect this change.

Eligibility for the Quality Incentive Program Rate Component

AB 143 Section 2: Welfare and Institutions Code Section 4519.10 was amended to require that beginning in the 2026–27 fiscal year, providers must comply with electronic visit verification, home- and community-based services rules, and applicable annual fiscal review and audit requirements to be eligible for the quality incentive program. This program is the opportunity for providers included within rate reform to earn the last ten percent of their applicable rate model.

Implementation: The Department will issue guidance to regional centers. Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect this change.

Master Plan for Developmental Services

AB 143 Sections 3 and 4: Welfare and Institutions Code Section 4580.5 was added to establish the Legislature’s intent for the Master Plan for Developmental Services, including receiving information on next steps and ongoing updates on implementation progress. Also, Welfare and Institutions Code Section 4581 was amended to establish meeting and reporting requirements regarding the implementation of any recommendations from the Master Plan for Developmental Services.

Implementation: There is no immediate impact on regional centers. The Master Plan Committee will meet twice per year to review the status of Master Plan recommendations.

Health and Safety Waiver Application Assistance

AB 143 Section 6: Welfare and Institutions Code Section 4620.4 was amended to make regional center health and safety waiver application assistance subject to an appropriation by the Legislature.

Implementation: The 2025 Budget Act includes no dedicated funding for the specified assistance. The Department issued [guidance](#) to regional centers on June 18, 2025

providing instructions for when and how to submit Health or Safety Waiver requests to the Department after July 1, 2025. Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect these changes.

Cost Effective Definition

AB 143 Section 7: Welfare and Institutions Code Section 4648 was amended to require the Department, with community input, to issue a written directive defining the term “cost effective” for all programs, including, but not limited to, the Self-Determination Program, no later than August 1, 2026.

***Implementation:** The Department will work with community partners, including regional centers, to define the term “cost effective” and will issue guidance to regional centers. After the definitions are established, regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed to reflect these changes.*

Self-Determination Program

AB 143 Section 8: Welfare and Institutions Code Section 4685.8 was amended to require the Department to work with community partners, including regional centers, to develop statewide standardized processes, procedures, and timelines related to enrollment, individual budget development, spending plans, financial management services, services and access to transition supports.

Specifically, this bill:

- Requires the Department, by March 1, 2027, with community input, to develop statewide standardized processes and procedures and timelines to be used by all regional centers. These standardized processes and procedures will cover enrollment, individual budgets, spending plans, financial management services, and access to transition supports.
- Requires initial individual budgets to be the total amount of the most recent available 12 months of purchase of service authorizations plus services authorized by the Individual Program Plan (IPP) team but not currently provided in a purchase of service authorization, minus services paid for by the regional center outside of the self-determination program and minus one-time expenses.
- Requires the IPP team to discuss unmet needs for participants with no or low purchases of services, which historically has been identified as services less than \$2,000 per year.
- Allows participants to transfer between service codes and budget categories with approval from the regional center or the participant’s IPP team.
- Requires regional centers to provide timely authorization to the participant’s financial management services.
- Requires regional centers to certify spending plans to verify that goods and services satisfy the following criteria:
 - Address the individual’s desired outcomes as identified in the IPP.
 - Are not available from generic services, as defined by the Department.
 - Are eligible for federal financial participation.

Implementation: The Department will issue guidance to regional centers on these topics. Regional centers must and should only update policies, procedures, publications, and other materials as needed to reflect these changes after receiving the Department's guidance.

Tailored Day Services

AB 143 Section 9: Welfare and Institutions Code Section 4688.21 was amended to require the Department, by July 1, 2025, to set the hourly rate for tailored day services and publish it on its website.

Implementation: The Department already has posted the tailored day service [rates](#) on its website.

Parental Fee Program Repeal

AB/SB 143 Sections 5 and 10: Welfare and Institutions Code Section 4784 was repealed. This eliminated the parental fee program after June 30, 2025. A conforming change also was made to Welfare and Institutions Code Section 4620.3.

Implementation: As of July 1, 2025, this program is repealed. The Department issued [D-2025-Case Management-10](#) on July 14, 2025, ending the program and describing remaining collection activities and contact information for any questions.

Employment Services

AB 143 Section 11: Welfare and Institutions Code Section 4851 was amended to correct the name of the Commission on Accreditation of Rehabilitation Facilities, and to allow for group supported employment ratios of one direct service professional to two through eight individuals receiving employment services. This change is consistent with the funded rate model for group supported employment.

Implementation: Effective July 1, 2025, the Supported Employment – Group (SEP) ratios align with the already-published [rate models](#). Regional centers must review the language changes to comply and update policies, procedures, publications, and other materials as needed. The Department will issue instructions for new SEP group submissions and reporting any changes to group ratios.

Rates Updates—Employment Services

AB 143 Section 12: Welfare and Institutions Code Section 4857.1 was amended to eliminate the requirement that regional centers purchase habilitation services only from accredited community nonprofit agency providers.

Implementation: Effective July 1, 2025, the requirement for employment providers to have nonprofit status is removed. Regional centers shall work with new or existing for-profit vendors that currently are providing employment services under a different service code to become vendored for supported employment under service codes 950 or 952.

AB143 Sections 13 and 15: Welfare and Institutions Code Section 4860 was amended to require the Department to establish and publish the hourly rate for supported employment and group services on its website. A conforming change was made to Welfare and Institutions Code Section 4870.

Implementation: There is no immediate impact on regional centers. The Department already has posted supported employment and group services [rates](#) on its website.

AB 143 Section 14: Welfare and Institutions Code Section 4861 was amended to specify that any new work activity program will receive the rate posted on the Department's website.

Implementation: There is no immediate impact on regional centers. The Department already has posted work activity program [rates](#) on its website.

Mandated Reporter Curriculum

SB 119 Section 34: Welfare and Institutions Code Section 18950.1 was added to require the use of a standardized curriculum for child welfare mandated reporters. Mandated reporters are strongly encouraged to complete the training using the curriculum within the first three months of employment, or no later than March 1, 2030.

Implementation: According to their contracts with the Department, regional centers have a Zero Tolerance Policy that requires regional centers, its vendors and long-term health care facilities and their respective employees be informed and knowledgeable on reporting abuse. The Department of Social Services is required to develop a standardized curriculum for mandated reporters by July 1, 2027. This training shall be available on the internet. After that date, the Department intends to require regional centers to train all employees who are mandated reporters using the new standardized curriculum.

Sincerely,

Original Signed by:

PETE CERVINKA
Director

cc: Regional Center Administrators
Regional Center Directors of Consumer Services
Regional Center Community Services Directors
Association of Regional Center Agencies

Bills ARCA tracks

The bills below are separated into four groups bills ARCA supports, active and inactive bills ARCA has an “oppose,” “concerns,” or other formal position on, bills ARCA is tracking with no position, and currently inactive bills ARCA either supports or tracks with no position. If an inactive bill’s status changes, it will automatically be moved to the correct “active” location. For these purposes, a bill may be inactive because it has failed a legislative deadline, been held in committee, or been either vetoed or signed into law by the Governor.

Bills with either a 'support' or 'comment' position as of Monday, July 28, 2025

AB 251 (Kalra D) Elders and dependent adults: abuse or neglect.

Current Text: Amended: 6/23/2025 [html](#) [pdf](#)

Location: 6/30/2025-S. APPR. SUSPENSE FILE

Summary: The Elder Abuse and Dependent Adult Civil Protection Act provides for the award of attorney’s fees and costs to, and the recovery of damages by, a plaintiff when it is proven by clear and convincing evidence that the defendant is liable for physical abuse or neglect, and the defendant has also been found guilty of recklessness, oppression, fraud, or malice in the commission of that abuse. This bill would authorize a court to apply a preponderance of the evidence standard to any claim brought against a residential care facility for the elderly, an adult community care facility, or a skilled nursing facility, except as specified, for remedies sought pursuant to the above provisions, upon circumstances in which spoliation of evidence, as defined, has been committed by the defendant, as specified.

Position

Support

Memo

[Position Statement ab 251 \(04/04/2025\)](#)

AB 282 (Pellerin D) Discrimination: housing: source of income.

Current Text: Amended: 7/17/2025 [html](#) [pdf](#)

Location: 7/16/2025-S. APPR.

Calendar: 8/18/2025 10 a.m. - 1021 O Street, Room 2200 SENATE APPROPRIATIONS, CABALLERO, ANNA, Chair

Summary: The California Fair Employment and Housing Act (FEHA) makes unlawful various practices connected to obtaining and financing housing accommodations, among other things, if those practices discriminate based on source of income. FEHA requires the Civil Rights Department to enforce specific provisions of the act, including the provision described above. This bill would provide that the establishment by a public agency or a similar entity, as specified, of policies or preferences in favor of an applicant or tenant who qualifies for or participates in federal, state, or local housing subsidy programs, as specified, does not constitute discrimination based on source of income for purposes of the above-described provisions of FEHA.

Position

Support

Memo

[Position Statement ab 282 \(04/04/2025\)](#)

AB 341 (Arambula D) Oral Health for People with Disabilities Technical Assistance Center Program.

Current Text: Amended: 5/1/2025 [html](#) [pdf](#)

Location: 7/9/2025-S. APPR.

Calendar: 8/18/2025 10 a.m. - 1021 O Street, Room
2200 SENATE APPROPRIATIONS, CABALLERO, ANNA, Chair

Summary: The Lanterman Developmental Disabilities Services Act requires the State Department of Developmental Services to contract with regional centers to provide services and supports to individuals with developmental disabilities, including intellectual disabilities and other conditions, and their families. Under current law, the regional centers purchase needed services and supports for individuals with developmental disabilities through approved service providers, or arrange for their provision through other publicly funded agencies. Current law defines "services and supports for persons with developmental disabilities" to mean specialized services and supports or special adaptations of generic services and supports directed toward the alleviation of a developmental disability, or toward the social, personal, physical, or economic habilitation or rehabilitation of an individual with a developmental disability, or toward the achievement and maintenance of an independent, productive, and normal life. Under existing law, specialized medical and dental care are included within that definition. This bill would require the department, no later than July 1, 2027, to contract with a public California dental school or college to administer the Oral Health for People with Disabilities Technical Assistance Center Program to improve dental care services for people with developmental and intellectual disabilities by reducing or eliminating the need for dental treatment using sedation and general anesthesia. The bill would authorize the contracted California dental school or college to partner with a public dental school or college, and would require the schools to meet certain criteria relating to location, accreditation, and a demonstrated record of working with regional centers.

Position

Support

Memo

[Position Statement ab 341 \(04/01/2025\)](#)

AB 346 (Nguyen D) In-home supportive services: licensed health care professional certification.

Current Text: Amended: 7/9/2025 [html](#) [pdf](#)

Location: 7/14/2025-S. APPR. SUSPENSE FILE

Summary: Current law defines supportive services for purposes of the county-administered In-Home Supportive Services (IHSS) program to include those necessary paramedical services that are ordered by a licensed health care professional, which persons could provide for themselves, but for their functional limitations. Current law requires an applicant for, or recipient of, in-home supportive services, as a condition of receiving these services, to obtain a certification from a licensed health care professional declaring that the applicant or recipient is unable to perform some activities of daily living independently, and that without services to assist the applicant or recipient with activities of daily living, the applicant or recipient is at risk of placement in out-of-home care, and defines a licensed health care professional for this purpose to mean an individual licensed in California by the appropriate California regulatory agency, acting within the scope of their license or certificate as defined in the Business and Professions Code. This bill would use the above-described definition of "licensed health care professional" for purposes of the provisions relating to paramedical services, and would, for purposes of the certification requirement, add to the above-described definition of "licensed health care professional" that the licensed individual has primary responsibilities to diagnose or provide treatment and care for physical or mental impairments that cause or contribute to an individual's functional limitations.

Position

Support

Memo

[Position Statement ab 346 \(04/04/2025\)](#)

AB 349 (Dixon R) Foster care supplement.

Current Text: Amended: 5/23/2025 [html](#) [pdf](#)

Location: 7/14/2025-S. APPR. SUSPENSE FILE

Summary: Current law establishes the Kinship Guardianship Assistance Payment Program (Kin-GAP), which provides aid on behalf of eligible children who have a kinship guardianship, and the Approved Relative Caregiver Funding Program (ARC), which provides payments to approved relative caregivers who are caring for children and nonminor dependents who are ineligible for Aid to Families with Dependent Children-Foster Care (AFDC-FC) payments. Current law requires, when a child is living with a parent who receives AFDC-FC or Kin-GAP benefits, or ARC payments, that the rate paid to the foster care provider on behalf of the parent include an additional monthly supplement of \$489 for the care and supervision of the child, subject to an appropriation in the annual Budget Act. This bill would require that supplement to be adjusted for inflation. To the extent the bill would impose new requirements on counties administering the AFDC-FC or Kin-GAP benefits or ARC payments, this bill would impose a state-mandated local program.

Position

Support

Memo

[Position Statement ab 349 \(04/04/2025\)](#)

AB 350 (Bonta D) Health care coverage: fluoride treatments.

Current Text: Amended: 7/7/2025 [html](#) [pdf](#)

Location: 7/2/2025-S. APPR.

Calendar: 8/18/2025 10 a.m. - 1021 O Street, Room
2200 SENATE APPROPRIATIONS, CABALLERO, ANNA, Chair

Summary: Current law sets forth specified coverage requirements for health care service plan contracts and health insurance policies. Current law provides for the Medi-Cal program, administered by the State Department of Health Care Services and under which health care services are provided to low-income individuals. The Medi-Cal program is, in part, governed and funded by federal Medicaid program provisions. Current law establishes a schedule of benefits under the Medi-Cal program and provides for various services, including certain dental services, that are rendered by Medi-Cal enrolled providers. Under current law, silver diamine fluoride treatments are a covered benefit for eligible children 0 to 6 years of age, inclusive, as specified, and application of fluoride or other appropriate fluoride treatment is covered for children 17 years of age and under. This bill would require a health care service plan contract or health insurance policy issued, amended, or renewed on or after January 1, 2026, to provide coverage without cost sharing for the application of fluoride varnish in the primary care setting for children under 21 years of age. Because a willful violation of this provision by a health care service plan would be a crime, the bill would impose a state-mandated local program. This bill would make the application of fluoride or other appropriate fluoride treatment, including fluoride varnish, a covered benefit under the Medi-Cal program for children under 21 years of age. The bill would require the State Department of Health Care Services to establish and promulgate a policy governing billing and reimbursement for the application of fluoride varnish, as specified.

Position

Support

Memo

[Position Statement ab 350 \(04/04/2025\)](#)

AB 563 (Jackson D) Childcare: Early Childhood Policy Council.

Current Text: Amended: 6/23/2025 [html](#) [pdf](#)

Location: 7/9/2025-S. APPR.

Calendar: 8/18/2025 10 a.m. - 1021 O Street, Room
2200 SENATE APPROPRIATIONS, CABALLERO, ANNA, Chair

Summary: Current law establishes the Early Childhood Policy Council to advise the Governor, the Legislature, and the State Department of Social Services on statewide early learning and care policy. Current law imposes various duties on the council, including, among others, requiring the council to prepare a formal public annual report on the work of the council and providing specific recommendations to the Governor, the Legislature, and the department on all aspects of the state's early childhood education system. This bill would require the above-described report to include, at a minimum, the successes, challenges, and gaps in the state's early childhood education systems and recommendations to facilitate advancing the state's vision for children, families, and communities. The bill would require the council to annually submit the report to the appropriate fiscal and policy committees of the Legislature.

Position

Support

Memo

[Position Statement ab 563 \(04/02/2025\)](#)

[AB 815](#) (Ortega D) Vehicle insurance: vehicle classification.

Current Text: Amended: 7/2/2025 [html](#) [pdf](#)

Location: 7/9/2025-S. APPR.

Calendar: 8/18/2025 10 a.m. - 1021 O Street, Room
2200 SENATE APPROPRIATIONS, CABALLERO, ANNA, Chair

Summary: Current law prohibits a motor vehicle, insured pursuant to a policy of automobile liability insurance, from being classified as a common carrier, livery, or for-hire vehicle solely for the reason that the named insured is performing volunteer services for a nonprofit charitable organization or governmental agency consisting of providing social service transportation, as defined. This bill, for purposes of insurance, would prohibit a motor vehicle, insured pursuant to a policy of automobile liability insurance, from being classified as a common carrier, commercial vehicle, for-hire vehicle, permissive use vehicle, or livery solely for the reason that the named insured is operating or using the insured motor vehicle to provide public social services, as defined, or social service transportation, as defined.

Position

Support

Memo

[Position Statement ab 815 \(04/03/2025\)](#)

[AB 906](#) (González, Mark D) Planning and zoning: housing elements: affirmatively furthering fair housing.

Current Text: Amended: 6/23/2025 [html](#) [pdf](#)

Location: 7/2/2025-S. APPR.

Summary: The Planning and Zoning Law requires a city or county to adopt a general plan for land use development that includes, among other things, a housing element. Current law requires the housing element to include, among other things, an inventory of land suitable and available for residential development, including specified sites, an analysis of the relationship of zoning and public facilities and services to these sites (first analysis), and an analysis of the relationship of the sites identified in the land inventory to the jurisdiction's duty to affirmatively further fair housing (2nd analysis). This bill would remove the requirement on cities and counties to include the 2nd analysis in their housing elements.

Position

Support

Memo

[Position Statement ab 906 \(04/04/2025\)](#)

AB 951 (Ta R) Health care coverage: behavioral diagnoses.

Current Text: Enrollment: 7/18/2025 [html](#) [pdf](#)

Location: 7/18/2025-A. ENROLLED

Summary: Would prohibit a health care service plan contract or health insurance policy issued, amended, or renewed on or after January 1, 2026, from requiring an enrollee or insured previously diagnosed with pervasive developmental disorder or autism to receive a rediagnosis to maintain coverage for behavioral health treatment for their condition. The bill would require a treatment plan to be made available to the plan or insurer upon request. Because a willful violation of this provision by a health care service plan would be a crime, the bill would impose a state-mandated local program.

Position

Support

Memo

[Position Statement ab 951 \(04/04/2025\)](#)

AB 1076 (Addis D) Qualified ABLE Program: CalABLE accounts: funding.

Current Text: Amended: 7/2/2025 [html](#) [pdf](#)

Location: 7/9/2025-S. APPR.

Calendar: 8/18/2025 10 a.m. - 1021 O Street, Room 2200 SENATE APPROPRIATIONS, CABALLERO, ANNA, Chair

Summary: Current federal law, the Stephen Beck, Jr., Achieving a Better Life Experience Act of 2014 (ABLE Act), encourages and assists individuals and families to save private funds for the purpose of supporting eligible individuals with disabilities to maintain their health, independence, and quality of life by excluding from gross income distributions used for qualified disability expenses by a beneficiary of a Qualified ABLE Program established and maintained by a state, as specified. Current law establishes the Qualified ABLE Program for purposes of implementing the federal ABLE Act in this state, and creates the California ABLE Program Trust with the purposes, powers, and duties of the trust to be vested in and exercised by the California ABLE Act Board. Current law requires the board to segregate the moneys coming into the ABLE program trust into 2 funds: the program fund, which is continuously appropriated, for specified purposes of the act, and the administrative fund, which is available upon appropriation by the Legislature for administration of the act. Current law requires all moneys paid by designated beneficiaries or eligible individuals in connection with ABLE accounts to be deposited, as received, into the program fund, promptly invested, and accounted for separately. Current law grants the board the power to accept grants, gifts, appropriations, and other moneys from any unit of federal, state, or local government, among other specified entities, for deposit to specified funds. This bill would authorize the California ABLE Act Board to additionally accept grants, gifts, legislative appropriations, and other moneys from a philanthropic entity, and would specify that the program can receive legislative appropriations.

Position

Support

Memo

[Position Statement ab 1076 \(04/03/2025\)](#)

AB 1172 (Nguyen D) Adult day programs: administration of inhalable emergency antiseizure medications.

Current Text: Amended: 7/17/2025 [html](#) [pdf](#)

Location: 7/16/2025-S. APPR.

Calendar: 8/18/2025 10 a.m. - 1021 O Street, Room 2200 SENATE APPROPRIATIONS, CABALLERO, ANNA, Chair

Summary: The California Community Care Facilities Act provides for the licensing and regulation of community care facilities by the State Department of Social Services, including adult day programs and residential facilities. This bill would authorize a licensed facility, as defined, upon receipt of a request from an individual, or the authorized representative of an individual, who has been diagnosed with seizures, a seizure disorder, or epilepsy and who has been prescribed inhalable emergency antiseizure medication, to authorize any volunteer, as defined, to administer inhalable emergency antiseizure medication to the individual during a seizure emergency. The bill would require the department, on or before January 1, 2027, to establish minimum standards for this training, as specified. The bill would prohibit inhalable emergency antiseizure medication from being administered to an individual unless the licensed facility has a seizure action plan for the individual that contains specified information, including, among other things, a signed written authorization verifying that a seizure experienced by the individual may be responded to at the licensed facility by a nonmedical professional, including through the administration of emergency antiseizure medication, as specified. The bill would require licensed facilities to provide a specified notice to all volunteers that, among other things, informs them of their right to rescind an offer to volunteer at any time, as specified, and explains the liability protections and indemnification requirements described below. The bill would require any licensed facility that authorizes volunteers to ensure that each volunteer will be provided defense and indemnification for any and all civil liability, as specified. The bill would prohibit a volunteer who administers inhalable emergency antiseizure medication, any person who provides training to a volunteer, or any person who otherwise complies with the requirements of the above-described provisions, in good faith and not for compensation, from being subject to professional review, civil liability, or criminal prosecution for their actions or omissions, as specified.

Position

Sponsored by
ARCA

Memo

[Position Statement ab 1172 \(04/02/2025\)](#)

[AB 1220](#) (Arambula D) Developmental services: denials of services and notices of actions.

Current Text: Amended: 6/18/2025 [html](#) [pdf](#)

Location: 6/30/2025-S. APPR. SUSPENSE FILE

Summary: The Lanterman Developmental Disabilities Services Act requires the State Department of Developmental Services to contract with regional centers to provide services and supports to individuals with developmental disabilities and their families. Under current law, the services and supports to be provided to a regional center consumer are contained in an individual program plan, developed in accordance with prescribed requirements. Current law requires the department and regional centers to annually collaborate to compile specified data relating to purchase of service authorization, utilization, and expenditure by each regional center, as specified, and to post that information on its internet website. This bill would require a regional center to document in each consumer's individual program plan all of the consumer's denials of services, notices of actions, and appeals.

Position

Support

[AJR 3](#) (Schiavo D) Public social services: Social Security, Medicare, and Medicaid.

Current Text: Amended: 7/8/2025 [html](#) [pdf](#)

Location: 7/9/2025-S. THIRD READING

Summary: Would call on the state's Representatives in Congress to vote against cuts to, and proposals to privatize, Social Security, Medicare, and Medicaid and would call

on the President of the United States to veto any legislation to cut or privatize these programs.

Position

Support

HR 24 (Nguyen D) Relative to Developmental Disabilities Awareness Month.

Current Text: Chaptered: 3/20/2025 [html](#) [pdf](#)

Location: 3/20/2025-A. ADOPTED

Summary: Would resolve that the Assembly recognizes the month of March 2025 as Developmental Disabilities Awareness Month.

Position

Support

SB 244 (Grayson D) Public postsecondary education: disabled student services: assessments.

Current Text: Amended: 5/23/2025 [html](#) [pdf](#)

Location: 7/8/2025-A. APPR.

Summary: Existing law makes legislative findings and declarations that set forth the principles for public postsecondary institutions and budgetary control agencies to observe in providing postsecondary programs and services for students with disabilities, including the principle that state-funded activity is directly related to the functional limitations of the verifiable disabilities of the students to be served. Existing law states the intent of the Legislature that, as appropriate for each postsecondary segment, funds for disabled student programs and services be based on 3 categories of costs, including a continuing variable costs category for services that vary in frequency depending on the needs of students, such as, among other services, diagnostic assessment, including both individual and group assessment not otherwise provided by the institution to determine functional, educational, or employment levels or to certify specific disabilities. This bill would revise the intent of the Legislature relating to diagnostic assessments by including costs for continuing assessments, required documentation, and individual and group assessments provided by the institution or by an outside entity, as provided. The bill would also expand the purpose of the assessments to include defining specific disabilities of the student and as proof for academic or institutional accommodations. This bill contains other existing laws.

Position

Support

Memo

[Position Statement sb 244 \(04/04/2025\)](#)

SB 258 (Wahab D) Crimes: rape.

Current Text: Amended: 5/1/2025 [html](#) [pdf](#)

Location: 7/16/2025-A. APPR.

Summary: Current law defines rape as an act of sexual intercourse accomplished under certain circumstances, including with a person not the spouse of the perpetrator where the person is incapable of giving legal consent because of a mental disorder or developmental or physical disability. This bill would remove the spousal exception from this definition of rape.

Position

Support

Memo

[Position Statement sb 258 \(04/04/2025\)](#)

SB 470 (Laird D) Bagley-Keene Open Meeting Act: teleconferencing.

Current Text: Amended: 4/10/2025 [html](#) [pdf](#)

Location: 7/9/2025-A. APPR.

Summary: Existing law, the Bagley-Keene Open Meeting Act, requires, with specified exceptions, that all meetings of a state body be open and public and all persons be permitted to attend any meeting of a state body. The act authorizes meetings through teleconference subject to specified requirements, including, among others, that the state body post agendas at all teleconference locations, that each teleconference location be identified in the notice and agenda of the meeting or proceeding, that each teleconference location be accessible to the public, that the agenda provide an opportunity for members of the public to address the state body directly at each teleconference location, and that at least one member of the state body be physically present at the location specified in the notice of the meeting. This bill would instead repeal these provisions on January 1, 2030.

Position

Support

Memo

[Position Statement sb 470 \(04/04/2025\)](#)

SCR 11 (Cervantes D) Epilepsy Awareness Month.

Current Text: Amended: 1/30/2025 [html](#) [pdf](#)

Location: 2/14/2025-S. THIRD READING

Summary: Would proclaim November 2025 as Epilepsy Awareness Month and call upon all Californians to recommit their communities to increasing awareness and understanding of those living with epilepsy.

Position

Support

Memo

[Position Statement scr 11 \(04/04/2025\)](#)

SR 10 (Wahab D) Relative to Foster Youth Awareness Month.

Current Text: Enrolled: 5/16/2025 [html](#) [pdf](#)

Location: 5/15/2025-S. ADOPTED

Summary: Would resolve that the Senate designates the Month of May 2025 as Foster Youth Awareness Month.

Position

Support

Memo

[Position Statement sr 10 \(04/04/2025\)](#)

**Bills with a formal position, not supported
Monday, July 28, 2025**

NONE

Bills tracked by ARCA with no formal position

AB 46 (Nguyen D) Diversion.

Current Text: Amended: 7/10/2025 [html](#) [pdf](#)

Location: 7/8/2025-S. APPR.

Summary: Current law authorizes a court to grant pretrial diversion to a defendant suffering from a mental disorder, on an accusatory pleading alleging the commission of a misdemeanor or felony offense, in order to allow the defendant to undergo mental health treatment. Current law provides that a defendant is eligible for diversion if they have been diagnosed with certain mental disorders and the court

finds that the mental disorder was a significant factor in the commission of the charged offense, unless there is clear and convincing evidence that the disorder was not a motivating, causal, or contributing factor to the defendant's involvement in the alleged offense. Current law prohibits defendants charged with specified offenses, including murder, from being placed in this diversion program. This bill would, if the defendant has been diagnosed with a mental disorder within 5 years of the current offense, as specified, require the court to find that the defendant's mental disorder was a significant factor in the commission of the offense, unless there is a preponderance of evidence that it was not a motivating, causal, or contributing factor to the defendant's involvement in the alleged offense.

AB 49 (Muratsuchi D) Schoolsites: immigration enforcement.

Current Text: Amended: 7/17/2025 [html](#) [pdf](#)

Location: 7/15/2025-S. APPR.

Summary: Current law prohibits, except as required by state or federal law or as required to administer a state or federally supported educational program, school officials and employees of a school district, county office of education, or charter school from collecting information or documents regarding citizenship or immigration status of pupils or their family members. Current law requires the superintendent of a school district, the superintendent of a county office of education, and the principal of a charter school, as applicable, to report to the respective governing board or body of the local educational agency in a timely manner any requests for information or access to a schoolsite by an officer or employee of a law enforcement agency for the purpose of enforcing the immigration laws in a manner that ensures the confidentiality and privacy of any potentially identifying information. This bill would prohibit school officials and employees of a local educational agency from allowing an immigration authority to enter a nonpublic area of a schoolsite for any purpose without being presented with a valid judicial warrant or a court order. The bill would require school officials and employees of a local educational agency, to the extent practicable, to request valid identification of any immigration authority seeking to enter a nonpublic area of a schoolsite.

AB 283 (Haney D) In-Home Supportive Services Employer-Employee Relations Act.

Current Text: Amended: 6/12/2025 [html](#) [pdf](#)

Location: 7/14/2025-S. APPR. SUSPENSE FILE

Summary: Current law establishes the In-Home Supportive Services (IHSS) program, which is administered by the State Department of Social Services, counties, and other entities, under which qualified aged, blind, or disabled persons are provided with supportive services in order to permit them to remain in their own homes. Current law authorizes a county board of supervisors to elect to contract with a nonprofit consortium to provide for the delivery of in-home supportive services or to establish, by ordinance, a public authority to provide for the delivery of those services, in accordance with certain procedures. Current law deems a public authority created under these provisions to be the employer of in-home supportive services personnel under the Meyers-Milias-Brown Act, which governs labor relations between local public employers and employees. Existing law also deems a nonprofit consortium contracting with a county to be the employer of in-home supportive services personnel for purposes of collective bargaining over wages, hours, and other terms and conditions of employment. Current law grants recipients of in-home supportive services the right to hire, fire, and supervise the work of any in-home supportive services personnel providing services for them. Current law prohibits the state and specified local public employers from deterring or discouraging public employees from becoming or remaining members of an employee organization. Current law also requires specified public employers to provide exclusive employee representatives access to new employee orientations. Current law generally grants the Public Employment Relations Board jurisdiction over violations of these provisions. Current law defines "public employers" who are subject to these provisions as including, among others, public agencies, cities, counties, and districts. This bill would expand

the definition of "public employer," for purposes of those provisions, to include an employer who is subject to the In-Home Supportive Services Employer-Employee Relations Act, which the bill would create. The bill would establish a method for resolving disputes regarding wages, benefits, and other terms and conditions of employment between the state and recognized employee organizations representing individual providers.

AB 416 (Krell D) Involuntary commitment.

Current Text: Amended: 7/17/2025 [html](#) [pdf](#)

Location: 7/16/2025-S. APPR.

Summary: Under the Lanterman-Petris-Short Act, when a person, as a result of a mental health disorder, is a danger to self or others, or gravely disabled, the person may, upon probable cause, be taken into custody by specified individuals, including, among others, by a peace officer, a designated member of a mobile crisis team, or a professional person designated by the county, and placed in a facility designated by the county and approved by the State Department of Health Care Services for up to 72 hours for evaluation and treatment. Current law authorizes county behavioral health director to develop procedures for the county's designation and training of professionals who will be designated to perform the above-described provisions. Current law authorizes the procedures to include, among others, the license types, practice disciplines, and clinical experience of the professionals eligible to be designated by the county. Current law exempts specified individuals, including a peace officer responsible for the detainment of a person under these provisions from criminal and civil liability for an action by a person who is released at or before the end of the period for which they were detained. This bill would require a county behavioral health director to include an emergency physician, as defined, as one of the practice disciplines eligible to be designated by the county when developing and implementing procedures for the designation and training of those professionals.

AB 450 (Carrillo D) Public social services: support for older and aging immigrants.

Current Text: Amended: 7/9/2025 [html](#) [pdf](#)

Location: 7/7/2025-S. APPR.

Summary: The Mello-Granlund Older Californians Act establishes the California Department of Aging and states that the mission of the department is to provide leadership to the area agencies on aging in developing systems of home- and community-based services that maintain individuals in their own homes or least restrictive homelike environments. This bill would, subject to an appropriation for these purposes, require the department, in conjunction with the State Department of Social Services, to oversee a stakeholder process to support findings and recommendations on how to best support older and aging immigrants, as defined, regardless of their immigration status, in California. The bill would require the departments to jointly establish a panel, as specified, and would require the panel to invite stakeholder and subject matter experts to participate. The bill would require the panel to consider specified issues, including affordability and access to social services and housing. The bill would require the first meeting to occur no later than 90 days after funding for the panel becomes available and authorizes both departments to contract with academic research entities to supplement the process. The bill would require the panel to issue findings and recommendations to both departments by July 1, 2028, on the most effective ways to implement policies and programs to support older and aging immigrants, regardless of their immigration status. The bill would require the departments to jointly submit a report containing the panel's findings to the Legislature on or before December 1, 2028.

AB 543 (González, Mark D) Medi-Cal: street medicine.

Current Text: Amended: 6/23/2025 [html](#) [pdf](#)

Location: 7/7/2025-S. APPR. SUSPENSE FILE

Summary: Current law sets forth various provisions for Medi-Cal coverage of community health worker services, enhanced care management, and community

supports, subject to any necessary federal approvals. Under existing law, these benefits are designed to, respectively, provide a link between health and social services and the community; address the clinical and nonclinical needs on a whole-person-care basis for certain target populations of Medi-Cal beneficiaries, including individuals experiencing homelessness; and provide housing transition navigation services, among other supports. Current law establishes mechanisms for Medi-Cal presumptive eligibility for certain target populations, including, among others, pregnant persons, children, and patients of qualified hospitals, for purposes of Medi-Cal coverage while other Medi-Cal eligibility determination procedures are pending, as specified. This bill would set forth provisions regarding street medicine, as defined, under the Medi-Cal program for persons experiencing homelessness, as defined. The bill would state the intent of the Legislature that the street medicine-related provisions coexist with, and not duplicate, other Medi-Cal provisions, including, but not limited to, those regarding community health worker services, enhanced care management, and community supports. The bill would require the department to implement a program of presumptive eligibility for persons experiencing homelessness who appear to be otherwise eligible for full-scope Medi-Cal coverage without a share of cost. The bill would authorize an enrolled Medi-Cal provider to make a presumptive eligibility determination for those persons. The bill would authorize a Medi-Cal managed care plan to elect to offer Medi-Cal covered services through a street medicine provider, as defined.

AB 586 (Flora R) Professional fiduciaries.

Current Text: Amended: 7/9/2025 [html](#) [pdf](#)

Location: 7/16/2025-S. APPR.

Summary: The Professional Fiduciaries Act establishes, until January 1, 2028, the Professional Fiduciaries Bureau, and requires the bureau to license and regulate professional fiduciaries. The act requires the bureau to maintain specified information in each licensee's file and requires a licensee to annually file with the bureau a statement under penalty of perjury containing specified information, including among other things, any licenses or professional certificates held by the licensee. The Moscone-Knox Professional Corporation Act defines and regulates professional corporations. The act provides that a professional organization renders professional services that may be lawfully rendered only pursuant to a license, certification, or registration authorized by, among others, the Business and Professions Code pursuant to a certificate of registration issued by the governmental agency regulating the profession, as specified. This bill would authorize licensees to organize professional fiduciary professional corporations to provide professional fiduciary services and would prescribe requirements and regulations for those professional corporations to provide fiduciary services. The bill would require a professional fiduciary professional corporation to register with the Secretary of State, as provided, and would require the corporation, its officers, directors, shareholders, and employees rendering professional fiduciary services to be in compliance with the Moscone-Knox Professional Corporation Act.

AB 610 (Alvarez D) Housing element: governmental constraints: disclosure statement.

Current Text: Amended: 7/17/2025 [html](#) [pdf](#)

Location: 7/16/2025-S. APPR.

Summary: The Planning and Zoning Law requires a city or county to adopt a general plan for land use development that includes, among other things, a housing element. Current law, commonly referred to as the Housing Element Law, prescribes requirements for a city's or county's preparation of, and compliance with, its housing element, and requires the Department of Housing and Community Development to review and determine whether the housing element substantially complies with the Housing Element Law, as specified. Current law requires the housing element to include an analysis of potential and actual governmental constraints upon the maintenance, improvement, or development of housing for all income levels,

including, among others, locally adopted ordinances that directly impact the cost and supply of residential development. Current law also requires the analysis to demonstrate local efforts to remove governmental constraints that hinder the locality from meeting its share of the regional housing need. This bill would require the housing element to include, in addition to the above-described analysis, a potential and actual governmental constraints disclosure statement that contains, among other things, an identification of each new or amended potential or actual governmental constraint, or revision increasing the stringency of a governmental constraint, that was adopted after the due date of the previous housing element and before submittal of the current draft housing element to the department. By imposing new requirements upon local governments submitting a housing element, the bill would impose a state-mandated local program.

AB 1003 (Calderon D) Public health: emergency plans and wildfire research.

Current Text: Amended: 5/23/2025 [html](#) [pdf](#)

Location: 7/8/2025-S. APPR.

Summary: Current law requires the State Department of Public Health to develop a plan with recommendations and guidelines for counties to use in the case of a significant air quality event, as defined, caused by wildfires or other sources, including establishing policies and procedures that address respiratory protection and other protective equipment and devices and providing information to residents on what they should do if the air quality index hits a significant threshold. Current law requires a county to develop a county-specific plan that addresses all of the recommendations and guidelines of the plan developed by the department. This bill would require the department's plan to be completed on or before June 30, 2026, posted on the department's internet website within 7 days of completion, and distributed within 14 days of completion to specified local and state entities and officers. The bill would require the county-specific plan to incorporate a process to conduct outreach and communicate to the public and with key stakeholders specified information about the plan. The bill would require, after a county-specific plan or a regional multicounty plan is approved by the county's board of supervisors, a copy of the plan to be distributed to specified local officers and to the local and state public health directors. The bill would require the department to post a copy of each county-specific plan or regional multicounty plan after a plan is adopted by each county within 14 days of receiving each plan.

SB 21 (Durazo D) Single-room occupancy units: demolition and replacement: housing assistance programs: eligibility for homeless individuals and families.

Current Text: Amended: 7/7/2025 [html](#) [pdf](#)

Location: 7/17/2025-A. APPR.

Summary: The Housing Crisis Act of 2019, among other things, prohibits an affected city or an affected county, as defined, from approving a housing development project that will require the demolition of occupied or vacant protected units, as defined, or that is located on a site where protected units were demolished in the previous 5 years unless specified requirements are met. Among these requirements, current law requires that the project replace all existing protected units and protected units demolished on or after January 1, 2020, and, if the project is a housing development project, as defined, it will include at least as many residential dwelling units as the greatest number of residential dwelling units that existed on the project site within the last 5 years. This bill, notwithstanding the above-described requirements, in the case of rehabilitation or replacement of an existing single-room occupancy building that meets prescribed criteria, would permit an affected city or an affected county to reduce the number of replacement units required if the project meets specified requirements, including, among others, that the reduction in replacement units is necessary to accommodate the conversion of single-room occupancy units, as provided, and that the converted units will be rental units with affordable rents, as specified.

SB 324 (Menjivar D) Medi-Cal: enhanced care management and community supports.

Current Text: Amended: 7/3/2025 [html](#) [pdf](#)

Location: 7/1/2025-A. APPR.

Summary: Current law, subject to implementation of the California Advancing and Innovating Medi-Cal (CalAIM) initiative, requires the State Department of Health Care Services to implement an enhanced care management (ECM) benefit designed to address the clinical and nonclinical needs on a whole-person-care basis for certain target populations of Medi-Cal beneficiaries enrolled in Medi-Cal managed care plans. Under current law, target populations include, among others, high utilizers with frequent hospital admissions, short-term skilled nursing facility stays, or emergency room visits, and individuals experiencing homelessness. Current law, subject to CalAIM implementation, authorizes a Medi-Cal managed care plan to elect to cover community supports, as specified. Under existing law, community supports that the department is authorized to approve include, among others, housing transition navigation services and medically supportive food and nutrition services. This bill would require a Medi-Cal managed care plan, for purposes of covering the ECM benefit, or if it elects to cover a community support, to contract with community providers, as defined, that can demonstrate that they are capable of providing access and meeting quality requirements in accordance with Medi-Cal guidelines. In determining which community providers to contract with, the bill would authorize Medi-Cal managed care plans to take into consideration whether those providers are available in the respective county and have experience in providing the applicable ECM or community support. The bill would require the department, for purposes of enforcing these provisions, to require Medi-Cal managed care plans to set goals every other year for the level of contracting and utilization of community providers and local entities, as defined. The bill would require these goals to be established in consultation with the department, as specified.

SB 340 (Laird D) General plans: housing element: emergency shelter.

Current Text: Amended: 3/17/2025 [html](#) [pdf](#)

Location: 7/17/2025-A. APPR.

Summary: Current law requires a city or county to prepare and adopt a general plan for its jurisdiction that contains certain mandatory elements, including a housing element. Current law requires the housing element to identify adequate sites for housing, including rental housing, factory-built housing, mobilehomes, and emergency shelters, among other things. Current law requires the housing element to contain an assessment of housing needs and an inventory of resources and constraints relevant to the meeting of these needs, including by identifying one or more zoning designations that allow residential uses, including mixed uses, where emergency shelters are allowed as a permitted use without a conditional use or other discretionary permit and that are suitable for residential uses. Current law requires an emergency shelter to include other interim interventions, including, but not limited to, a navigation center, bridge housing, and respite or recuperative care. This bill would additionally require an emergency shelter to include all services provided onsite, including the addition or expansion of services that are consistent with certain written, objective standards.

SB 402 (Valladares R) Health care coverage: autism.

Current Text: Introduced: 2/14/2025 [html](#) [pdf](#)

Location: 7/17/2025-A. THIRD READING

Summary: Current law requires a health care service plan contract or a health insurance policy to provide coverage for behavioral health treatment for pervasive developmental disorder or autism and defines "behavioral health treatment" to mean specified services and treatment programs, including treatment provided pursuant to a treatment plan that is prescribed by a qualified autism service provider and administered either by a qualified autism service provider or by a qualified autism

service professional or qualified autism service paraprofessional. Current law defines "qualified autism service provider," "qualified autism service professional," and "qualified autism service paraprofessional" for those purposes. Those definitions are contained in the Health and Safety Code and the Insurance Code. This bill would move those definitions to the Business and Professions Code. The bill would also make technical and conforming changes.

SB 481 (Alvarado-Gil R) In-home supportive services.

Current Text: Introduced: 2/19/2025 [html](#) [pdf](#)

Location: 2/19/2025-S. RLS.

Summary: Current law provides for the In-Home Supportive Services (IHSS) program, administered by the State Department of Social Services and counties, under which qualified aged, blind, and disabled persons are provided with supportive services in order to permit them to remain in their own homes. This bill would make technical, nonsubstantive changes to those provisions.

SB 582 (Stern D) Health and care facilities: licensing during emergencies or disasters.

Current Text: Amended: 6/26/2025 [html](#) [pdf](#)

Location: 7/15/2025-A. APPR.

Summary: The Long-Term Care, Health, Safety, and Security Act of 1973 generally requires the State Department of Public Health to license, inspect, and regulate long-term health care facilities, including skilled nursing facilities. Existing law makes it a misdemeanor for any person to willfully or repeatedly violate the act, as specified. Current regulations require skilled nursing facilities to adopt and follow a written external disaster and mass casualty program plan developed with the advice and assistance of county or regional and local planning offices. This bill would require skilled nursing facilities to update the external disaster and mass casualty program plan at least once per year. The bill would require, in adopting and updating the plan, skilled nursing facilities to, among other things, seek input from county or regional and local planning offices, including the medical health operational area coordinator (MHOAC).

SB 660 (Menjivar D) California Health and Human Services Data Exchange Framework.

Current Text: Amended: 7/17/2025 [html](#) [pdf](#)

Location: 7/16/2025-A. APPR.

Summary: Existing law establishes the Department of Health Care Access and Information to oversee and administer various health programs related to health care infrastructure, such as health policy and planning, health professions development, and facilities design review and construction, among others. Existing law requires the California Health and Human Services Agency to establish the California Health and Human Services Data Exchange Framework to require the exchange of health information among health care entities and government agencies in the state, among other things. Existing law requires the agency to convene a stakeholder advisory group to advise on the development of implementation of the California Health and Human Services Data Exchange Framework. This bill would require the Department of Health Care Access and Information, on or before January 1, 2026, and subject to an appropriation in the annual Budget Act, to take over the establishment, implementation, and all of the functions related to the California Health and Human Services Data Exchange Framework, including the data sharing agreement and policies and procedures, from the agency. The bill would expand the entities that are specifically required to execute a data sharing agreement with the California Health and Human Services Data Exchange Framework and authorize the department to determine other categories of entities required to execute a data sharing agreement, as specified. The bill would require the department, no later than July 1, 2026, to establish a process to designate qualified health information organizations as data sharing intermediaries that have demonstrated their ability to meet requirements of

the California Health and Human Services Data Exchange Framework. The bill would require the department to annually report to the Legislature on the California Health and Human Services Data Exchange Framework, including compliance with data sharing agreements.

Total Measures: 16

Total Tracking Forms: 16

Inactive bills (supported/tracked) as of Monday, July 28, 2025

AB 38 (Lackey R) Crimes: serious and violent felonies.

Current Text: Introduced: 12/2/2024 [html](#) [pdf](#)

Location: 5/1/2025-A. 2 YEAR

Summary: Current law classifies certain criminal offenses as a “violent felony” for the purposes of various provisions of the Penal Code, including sentencing enhancements for prior convictions, as well as numerous other provisions. Current law includes among the list of violent felonies rape accomplished against a person’s will by means of force, violence, duress, menace, or fear, or rape accomplished against the victim’s will by threat of violent retaliation, but does not include rape of a person unable to give consent due to disability, rape under false pretenses, or rape accomplished by threat of incarceration, arrest, or deportation. This bill would also include specified crimes involving the rape or sexual assault of a minor who has a developmental disability in the list of violent felonies.

AB 257 (Flora R) Specialty care networks: telehealth and other virtual services.

Current Text: Amended: 3/27/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Would, subject to an appropriation, require the California Health and Human Services Agency, in collaboration with the Department of Health Care Access and Information and the State Department of Health Care Services, to establish a demonstration project for a grant program. Under the bill, the grant program would be aimed at facilitating a telehealth and other virtual services specialty care network or networks that are designed to serve patients of safety-net providers consisting of qualifying providers, as defined.

Memo

[Position Statement ab 257 \(04/04/2025\)](#)

AB 259 (Rubio, Blanca D) Open meetings: local agencies: teleconferences.

Current Text: Amended: 4/21/2025 [html](#) [pdf](#)

Location: 7/17/2025-S. 2 YEAR

Summary: The Ralph M. Brown Act, requires, with specified exceptions, that all meetings of a legislative body, as defined, of a local agency be open and public and that all persons be permitted to attend and participate. Current law, until January 1, 2026, authorizes the legislative body of a local agency to use alternative teleconferencing if, during the teleconference meeting, at least a quorum of the members of the legislative body participates in person from a singular physical location clearly identified on the agenda that is open to the public and situated within the boundaries of the territory over which the local agency exercises jurisdiction, and the legislative body complies with prescribed requirements. Current law requires a member to satisfy specified requirements to participate in a meeting remotely

pursuant to these alternative teleconferencing provisions, including that specified circumstances apply. Current law establishes limits on the number of meetings a member may participate in solely by teleconference from a remote location pursuant to these alternative teleconferencing provisions, including prohibiting such participation for more than 2 meetings per year if the legislative body regularly meets once per month or less. This bill would extend the alternative teleconferencing procedures until January 1, 2030.

Memo

[Position Statement ab 259 \(04/02/2025\)](#)

[AB 276](#) (Bennett D) Background checks.

Current Text: Introduced: 1/21/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: The California Community Care Facilities Act provides for the licensure and regulation of community care facilities, including foster family homes and foster family agencies, by the State Department of Social Services. Current law requires a criminal record check of applicants for a license, special permit, or certificate of approval for a foster family home or certified family home, and other persons, including nonclients who reside in those homes and staff and employees. Current law requires the department to check the child abuse and neglect registry of a different state for a licensee of a community care facility who has lived in another state in the preceding 5 years. Current law generally makes violations of these requirements a crime. This bill would authorize a licensee of a community care facility to approve an individual to care for children before the completion of another state's child abuse and neglect registry check if certain specified conditions are met, including that the community care facility has submitted a request for the out-of-state abuse and neglect registry check to the department. The bill would require a licensee to remove an applicant from the community care facility immediately upon receipt of information that would disqualify the applicant from approval and notify the department of the removal within 3 business days.

Memo

[Position Statement ab 276 \(04/04/2025\)](#)

[AB 277](#) (Alanis R) Behavioral health centers, facilities, and programs: background checks.

Current Text: Amended: 4/22/2025 [html](#) [pdf](#)

Location: 5/1/2025-A. 2 YEAR

Summary: Current law generally provides requirements for the licensing of business establishments. Current law requires a business that provides services to minors, as defined, to provide written notice to the parent or guardian of a minor participating in the service offered by the business regarding the business' policies relating to criminal background checks for employees, as specified. Current law requires the Department of Justice to maintain state summary criminal history information, as defined, and to furnish this information as required by statute to specified entities, including a human resource agency or an employer. Under existing law, the disclosure of state summary criminal history information to an unauthorized person is a crime. This bill would require a person who provides behavioral health treatment for a behavioral health center, facility, or program to undergo a background check, as specified.

[AB 308](#) (Ramos D) Mobile crisis teams or units: procedures.

Current Text: Amended: 4/24/2025 [html](#) [pdf](#)

Location: 7/17/2025-S. 2 YEAR

Summary: Current law sets forth various provisions relating to mobile crisis teams, including with regard to behavioral health crisis services under the Miles Hall Lifeline and Suicide Prevention Act, involuntary commitment under the Lanterman-Petris-Short Act, and community-based mobile crisis intervention services through a Medi-Cal behavioral health delivery system under the Medi-Cal program. Current law requires a regional center, which serves individuals with intellectual or developmental disabilities, to implement an emergency response system for, among other groups, consumers who receive mobile crisis services. Current law requires a regional center and a county mental health agency to develop a general plan for crisis intervention for persons served by both systems. Current law establishes an advisory council for purposes of developing recommendations for improving outcomes of interactions between law enforcement and people with intellectual or developmental disabilities or with mental health conditions. This bill, in the case of a county that operates, or that contracts for the operation of, a mobile crisis team or unit, would authorize the county behavioral health director to develop procedures for the mobile crisis team or unit that include the handling of an emergency situation, or a crisis incident, involving an individual with an intellectual or developmental disability or an individual with a behavioral health condition.

Memo

[Position Statement ab 308 \(04/29/2025\)](#)

AB 315 (Bonta D) Medi-Cal: Home and Community-Based Alternatives Waiver.

Current Text: Introduced: 1/23/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: The Medi-Cal program is, in part, governed and funded by federal Medicaid program provisions. Under existing law, home- and community-based services (HCBS) approved by the United States Department of Health and Human Services are covered for eligible individuals to the extent that federal financial participation is available for those services under the state plan or waivers granted in accordance with certain federal provisions. Current law authorizes the Director of Health Care Services to seek waivers for any or all approvable HCBS. Current law sets forth provisions for the implementation of the Nursing Facility/Acute Hospital Transition and Diversion Waiver, which is the predecessor of the Home and Community-Based Alternatives (HCBA) Waiver, for purposes of providing care management services to individuals who are at risk of nursing facility or institutional placement. This bill would recast those provisions to refer to the HCBA Waiver. The bill would delete a provision authorizing the expansion of the number of waiver slots up to 5,000 additional slots, and would instead require the enrollment of all eligible individuals who apply for the HCBA Waiver. The bill would require the department, by March 1, 2026, to seek any necessary amendments to the waiver to ensure that there is sufficient capacity to enroll all eligible individuals who are currently on a waiting list for the waiver, as specified.

Memo

[Position Statement ab 315 \(04/04/2025\)](#)

AB 319 (Jackson D) Foster youth: trauma-informed services.

Current Text: Amended: 3/19/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Current law requires each county to develop and implement a memorandum of understanding (MOU) setting forth the roles and responsibilities of

agencies and other entities that serve children and youth in foster care who have experienced severe trauma. Current law requires that the MOU include provisions addressing, among other things, the establishment and operation of an interagency leadership team. Current law requires the Secretary of California Health and Human Services and the Superintendent of Public Instruction to establish a joint interagency resolution team consisting of representatives from specified state departments to support implementation of those MOUs, among other functions. Current law requires the resolution team to develop and submit certain recommendations to the Legislature on various items, including a statewide plan for any additional development needed for a trauma-informed, therapeutic continuum of care to support youth in-state in the least restrictive setting. Current law requires the team to track and report deidentified information of children and nonminor dependents in foster care who have been assisted to preserve, or secure new, intensive therapeutic options. This bill would require a county, in collaboration with the leadership team, inclusive of tribes, to submit plans to the resolution team describing how the county intends to ensure that coordinated, timely, and trauma-informed services are provided to children and youth in foster care who have experienced severe trauma.

AB 369 (Rodriguez, Michelle D) Emergency services: liability.

Current Text: Chaptered: 7/14/2025 [html](#) [pdf](#)

Location: 7/14/2025-A. CHAPTERED

Summary: The Seizure Safe Schools Act, if a pupil diagnosed with seizures, a seizure disorder, or epilepsy has been prescribed an emergency anti-seizure medication by the pupil's health care provider, authorizes the pupil's local educational agency, upon receipt of a request from the pupil's parent or guardian, to designate one or more volunteers at the pupil's school to receive initial and annual refresher training regarding the emergency use of anti-seizure medication and authorizes a school nurse or, if the school does not have a school nurse or the school nurse is not onsite or available, a volunteer who has been designated and received training regarding the emergency use of anti-seizure medication, to administer emergency anti-seizure medication to a pupil diagnosed with seizures, a seizure disorder, or epilepsy if the pupil is suffering from a seizure. Current law, notwithstanding any other law, excuses a person trained as required who administers emergency anti-seizure medication or medication prescribed for seizure disorder symptoms in compliance with these provisions, in good faith and not for compensation, to a pupil diagnosed with seizures, a seizure disorder, or epilepsy who appears to be experiencing a seizure, from professional review, liability in a civil action, or criminal prosecution for the person's acts or omissions in administering the emergency anti-seizure medication, as specified. This bill, notwithstanding any other law, and except as provided in the Seizure Safe Schools Act, would excuse a person who is otherwise not licensed to administer anti-seizure rescue medication, but who administers anti-seizure rescue medication at the scene of an emergency, in good faith and not for compensation, to a person who is experiencing, or is suspected of experiencing, a seizure, from professional review, liability in a civil action, or criminal prosecution for that administration of anti-seizure rescue medication so long as the person's conduct is not grossly negligent and does not constitute willful or wanton misconduct.

AB 371 (Haney D) Dental coverage.

Current Text: Amended: 4/24/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Current law prohibits a contract between a plan or insurer and a dentist from requiring a dentist to accept an amount set by the plan or insurer as payment for dental care services provided to an enrollee or insured that are not covered

services under the enrollee's contract or the insured's policy. Current law requires a plan or insurer to make specified disclosures to an enrollee or insured regarding noncovered dental services. Current law requires a health care service plan or health insurer to comply with specified timely access requirements. For a specified plan or insurer offering coverage for dental services, existing law requires urgent dental appointments to be offered within 72 hours of a request, nonurgent dental appointments to be offered within 36 business days of a request, and preventive dental care appointments to be offered within 40 business days of a request, as specified. Current law requires a contract between a health care service plan and health care provider to ensure compliance with network adequacy standards and to require reporting by providers to plans to ensure compliance. Under current law, a health care service plan is required to annually report to the Department of Managed Health Care on this compliance. Current law authorizes the Department of Insurance to issue guidance to insurers regarding annual timely access and network reporting methodologies. If a health care service plan or health insurer pays a contracting dental provider directly for covered services, this bill would require the plan or insurer to pay a noncontracting dental provider directly for covered services if the noncontracting provider submits to the plan or insurer a written assignment of benefits form signed by the enrollee or insured. The bill would require the plan or insurer to provide a predetermination or prior authorization to the dental provider and to reimburse the provider for not less than that amount, except as specified. The bill would require the plan or insurer to notify the enrollee or insured that the provider was paid and that the out-of-network cost may count towards their annual or lifetime maximum.

AB 375 (Nguyen D) Medical Practice Act: health care providers: qualified autism service paraprofessionals.

Current Text: Introduced: 2/3/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: The Medical Practice Act establishes the Medical Board of California and charges it with administrative and enforcement duties related to the provision of medical services under the act. Current law establishes requirements for the delivery of medical services, including via telehealth by specified health care providers. A violation of the act is a crime. Under current law, a "health care provider," for purpose of the act, includes a qualified autism service provider or a qualified autism service professional that is certified by a national entity, as specified. This bill would expand that definition of "health care provider" to also include a qualified autism service paraprofessional.

AB 508 (Aguilar-Curry D) Residential care facilities for the elderly: direct care ratios.

Current Text: Amended: 4/24/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: The California Residential Care Facilities for the Elderly Act requires the State Department of Social Services to license, inspect, and regulate residential care facilities for the elderly (RCFEs), as defined, and imposes criminal penalties on a person who violates the act or who willfully or repeatedly violates any rule or regulation adopted under the act. This bill would require each RCFE to calculate a direct care ratio, as defined, and maintain records of its direct care ratios for a minimum of 12 months. The bill would require RCFEs to disclose its direct care ratios to residents or to the resident's representatives upon admission and any time there is a rate increase, as specified. The bill would require these disclosures to be provided in writing and signed by the resident, the resident's representative, or the licensee or an

employee of the licensee, as specified, to confirm receipt. The bill would require copies of the signed disclosure to be provided to the resident or the resident's representative. The bill would require each RCFE to make its direct care ratios available to the public by specified means, including, among others, by posting the daily direct care ratio on the facility's internet website. The bill would require the RCFE's internet website and any literature or internet website used to advertise the RCFE and the level of care provided by that facility to include a statement that direct care ratios are calculated on a daily basis, that direct care ratios are available to the public upon request for any given day within the prior 12 months, and that direct care ratios are required to be disclosed to residents or their representatives at the points of time described above.

AB 636 (Ortega D) Medi-Cal: diapers.

Current Text: Amended: 3/13/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Would establish diapers as a covered Medi-Cal benefit for a child greater than 3 years of age who has been diagnosed with a condition, as specified, that contributes to incontinence, and for an individual under 21 years of age if necessary to correct or ameliorate a condition pursuant to certain federal standards. The bill would limit the provided diapers to an appropriate supply based on the diagnosed condition and the age of the Medi-Cal beneficiary. The bill would require the department to seek any necessary federal approvals to implement these provisions. The bill would condition implementation of these provisions on receipt of any necessary federal approvals, the availability of federal financial participation, and an appropriation by the Legislature. The bill would require the department to update the Medi-Cal provider manual, as applicable, in the course of implementing these provisions.

Memo

[Position Statement ab 636 \(04/04/2025\)](#)

AB 804 (Wicks D) Medi-Cal: housing support services.

Current Text: Introduced: 2/18/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Current law establishes the Medi-Cal program, which is administered by the State Department of Health Care Services and under which qualified low-income individuals receive health care services. Current law, subject to implementation of the California Advancing and Innovating Medi-Cal (CalAIM) initiative, authorizes a Medi-Cal managed care plan to elect to cover community supports approved by the department as cost effective and medically appropriate in a comprehensive risk contract that are in lieu of applicable Medi-Cal state plan services. Under current law, community supports that the department is authorized to approve include, among other things, housing transition navigation services, housing deposits, and housing tenancy sustaining services. Current law, subject to an appropriation, requires the department to complete an independent analysis to determine whether network adequacy exists to obtain federal approval for a covered Medi-Cal benefit that provides housing support services. Current law requires that the analysis take into consideration specified information, including the number of providers in relation to each region's or county's number of people experiencing homelessness. Current law requires the department to report the outcomes of the analysis to the Legislature by January 1, 2024. This bill would delete the requirement for the department to complete that analysis, and instead would make housing support services for specified populations a covered Medi-Cal benefit when the Legislature has made an appropriation for purposes of the housing support services. The bill would require the

department to seek federal approval for the housing support services benefit, as specified.

Memo

[Position Statement ab 804 \(04/01/2025\)](#)

[AB 926](#) (Gipson D) Juvenile court: visitation.

Current Text: Introduced: 2/19/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Current law establishes a system of statewide child welfare services, administered by the State Department of Social Services and county child welfare agencies, with the intent that all children are entitled to be safe and free from abuse and neglect. Current law establishes the jurisdiction of the juvenile court, which may adjudge a child to be a dependent of the court under certain circumstances, including when the child suffered, or there is a substantial risk that the child will suffer, serious physical harm, or a parent fails to provide the child with adequate food, clothing, shelter, or medical treatment. Current law establishes the grounds for removal of a dependent child from the custody of their parents or guardian, and establishes procedures to determine placement of a dependent child. Current law authorizes the court to make orders regarding visitation between a child and parent or legal guardian, subject to specified conditions. Current law prohibits a visitation from jeopardizing the safety of a child. This bill would require, at the initial petition hearing, the court to make an order regarding visitation between the child and the parent or legal guardian, setting forth the frequency and duration most conducive to quality family time, and whether the visitation must be supervised. The bill would require the court to order contact between the parent and child commencing within 72 hours. The bill would remove the above-described prohibition prohibiting a visitation from jeopardizing the safety of a child. This bill would require a court to order unsupervised visitation between a parent or legal guardian and a child or children, unless unsupervised visitation is contrary to the child's welfare and there is a substantial danger to the physical health of the child or the child is suffering severe emotional damage and the child's physical or emotional health cannot reasonably be protected without supervised visitation, or there is substantial evidence that the parent or legal guardian may flee the jurisdiction with the child.

[AB 974](#) (Patterson R) Medi-Cal managed care plans: enrollees with other health care coverage.

Current Text: Amended: 3/24/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Current law establishes the Medi-Cal program, which is administered by the State Department of Health Care Services and under which qualified low-income individuals receive health care services, under fee-for-service or managed care delivery systems. The Medi-Cal program is, in part, governed and funded by federal Medicaid program provisions. Under current federal law, in accordance with third-party liability rules, Medicaid is generally the payer of last resort if a beneficiary has another source of health care coverage in addition to Medicaid coverage. Under this bill, in the case of a Medi-Cal managed care plan enrollee who also has other health care coverage and for whom the Medi-Cal program is a payer of last resort, the department would be required to ensure that a provider that is not contracted with the plan and that is billing the plan for Medi-Cal allowable costs not paid by the other health care coverage does not face administrative requirements significantly in excess of the administrative requirements for billing those same costs to the Medi-Cal fee-for-service delivery system. Under the bill, in the case of an enrollee who meets those coverage criteria, except as specified, a Medi-Cal fee-for-service provider would not

be required to contract as an in-network provider with the Medi-Cal managed care plan in order to bill the plan for Medi-Cal allowable costs for covered health care services.

AB 1186 (Patel D) Data collection: race and ethnicity: minimum categories.

Current Text: Amended: 4/3/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Current law requires state agencies, boards, or commissions that directly or by contract collect demographic data on the ethnic origin, ethnicity, or race of Californians to use specified collection categories for Asian, Native Hawaiian, Pacific Islander, Black, and African American groups. Current law establishes the Demographic Research Unit within the Department of Finance, which, among other things, acts as the primary state government liaison with the United States Census Bureau in the acquisition and distribution of census data and related documentation to state agencies. This bill, subject to a specified exception, would require any state agency, board, or commission that directly or by contract collects demographic data on the ethnic origin, ethnicity, or race of Californians to collect data on at least the minimum categories on race and ethnicity, as defined, as well as at least the top 9 largest detailed categories, and prescribed write-in options, as provided.

AB 1335 (Gonzalez, Jeff R) Habilitation services.

Current Text: Introduced: 2/21/2025 [html](#) [pdf](#)

Location: 5/1/2025-A. 2 YEAR

Summary: The Lanterman Developmental Disabilities Services Act requires the State Department of Developmental Services to contract with regional centers to provide services and support to individuals with developmental disabilities. Existing law requires a regional center consumer to be referred to a provider of habilitation services if they are determined to be in need of habilitation services. Existing law authorizes a regional center to vendor a new work activity or supported employment program after determining the capacity of the program to deliver effective services and assessing the ability of the program to comply with the requirements of CARF the Rehabilitation Accreditation Commission. Existing law requires a regional center to monitor, evaluate, and audit habilitation services providers for program effectiveness using performance criteria that include, among other things, compliance with applicable CARF standards. This bill would remove the requirement for a work activity program or supported employment program to comply with the requirements of CARF the Rehabilitation Accreditation Commission, and would instead require a regional center to monitor, evaluate, and audit habilitation services providers for program effectiveness using, among other things, services standards contained in regulations adopted by the department.

AB 1386 (Bains D) Health facilities: perinatal services.

Current Text: Introduced: 2/21/2025 [html](#) [pdf](#)

Location: 5/23/2025-A. 2 YEAR

Summary: Under current law, a general acute care hospital is required to provide certain basic services, including medical, nursing, surgical, anesthesia, laboratory, radiology, pharmacy, and dietary services. Current law authorizes a general acute care hospital to provide various special or supplemental services if certain conditions are met. Current regulations define a supplemental service as an organized inpatient or outpatient service that is not required to be provided by law or regulation. This bill

would, beginning _____, include perinatal services as a basic service. The bill would require, on or before _____, the State Department of Public Health to establish a process to approve or deny a "perinatal service compliance plan" to meet the requirement to provide perinatal services. The bill would require, on or before _____, any general acute care hospital that does not provide perinatal services to submit a "perinatal service compliance plan to the department, with specified information. By expanding the scope of a crime, this bill would impose a state-mandated local program.

Memo

[Position Statement ab 1386 \(04/03/2025\)](#)

AB 1465 (Rubio, Blanca D) Developmental services: data.

Current Text: Introduced: 2/21/2025 [html](#) [pdf](#)

Location: 5/8/2025-A. 2 YEAR

Summary: Existing law, in order to gather data that is relevant to ensuring the safety and well-being of persons with developmental disabilities, requires the State Department of Developmental Services to ensure that the client master file entry of any person with developmental disabilities who is placed by a regional center is updated within 30 days after the change of residence. This bill would make a nonsubstantive, technical change to that provision.

ACR 55 (Gonzalez, Jeff R) ARC v. Department of Developmental Services: 40th anniversary.

Current Text: Chaptered: 5/5/2025 [html](#) [pdf](#)

Location: 5/5/2025-A. CHAPTERED

Summary: Would recognize the month of March 2025 as the 40th anniversary of the California Supreme Court decision in ARC v. Department of Developmental Services and celebrate the Legislature's 1969 passage of the Lanterman Developmental Disabilities Services Act.

SB 84 (Niello R) Disability access: construction-related accessibility claims: notice of violation and opportunity to correct.

Current Text: Amended: 6/18/2025 [html](#) [pdf](#)

Location: 7/17/2025-A. 2 YEAR

Summary: Current law prohibits discrimination on the basis of various specified personal characteristics, including disability. Current law imposes minimum statutory damages for construction-related accessibility claims if the violation of a construction-related accessibility standard denied the plaintiff full and equal access to the place of public accommodation on a particular occasion, as specified. Current law imposes various limits on a defendant's liability for statutory damages under specified sets of conditions, including if the defendant, among other things, corrects the construction-related violations within a specified time. This bill would prohibit a construction-related accessibility claim for statutory damages from being initiated in a legal proceeding against a defendant who employs 50 or fewer individuals, as specified, unless the defendant has been served with a letter specifying each alleged violation, and the alleged violations have not been corrected within 120 days of service of the letter. The bill would provide that a defendant is not liable for statutory damages, plaintiff's attorney's fees, or costs for an alleged violation that is corrected within 120 days of service of a letter alleging the violation.

SB 367 (Allen D) Mental health.

Current Text: Amended: 5/1/2025 [html](#) [pdf](#)

Location: 5/23/2025-S. 2 YEAR

Summary: The Lanterman-Petris-Short (LPS) Act authorizes the involuntary commitment and treatment of persons with specified mental disorders. Under the act, when a person, as a result of a mental health disorder, is a danger to themselves or others, or is gravely disabled, the person may, upon probable cause, be taken into custody by specified individuals, including, among others, a peace officer and a designated member of a mobile crisis team, and placed in a facility designated by the county and approved by the State Department of Health Care Services for up to 72 hours for evaluation and treatment. Current law defines "assessment" for those purposes to mean the determination of whether a person shall be evaluated and treated. This bill would require an assessment to consider reasonably available, relevant information as specified. The bill would also authorize an assessment to be used to assist specified individuals in developing an aftercare plan for an individual, if that individual has agreed to an aftercare plan and can be properly served without being detained.

SB 422 (Grayson D) California Workforce Development Board: developmental services.

Current Text: Introduced: 2/18/2025 [html](#) [pdf](#)

Location: 5/23/2025-S. 2 YEAR

Summary: Current law requires the California Workforce Development Board to assist the Governor in certain activities, including the review and technical assistance of statewide policies, programs, and recommendations to support workforce development systems in the state, as specified. This bill would require the board, on or before January 1, 2027, to review existing recommendations and to research and provide a report to the Governor and the Legislature including recommendations on the most compelling strategies for addressing the workforce shortage in California's developmental services system, as specified. The bill would require the State Department of Developmental Services to provide staff support and expertise to the board for this purpose.

SB 434 (Wahab D) Residential care facilities for the elderly: housing protections.

Current Text: Amended: 4/1/2025 [html](#) [pdf](#)

Location: 5/23/2025-S. 2 YEAR

Summary: Current law provides for the licensure and regulation of residential care facilities for the elderly (RCFEs) by the State Department of Social Services. Under current law, a licensee of an RCFE that sends a notice of eviction to a resident is required to include in that notice specified information, including the effective date of the eviction and resources available to assist the resident in identifying alternative housing. Under current law, the RCFE is also required to notify, or mail a copy of the notice to quit to, the resident's responsible person. Current law requires that a licensee of an RCFE provide a resident with a 30-day notice of eviction, except where the department has approved the RCFE to provide a 3-day notice. This bill would extend the length of notice that a licensee is required to provide to a resident to 30, 60, or 90 days, depending on the length of the resident's residency in the RCFE, among other factors relating to nonpayment of the rate for basic services within 10 days of the due date. The bill would additionally require a licensee of an RCFE to include in a notice of eviction documentation of the licensee's reasonable efforts to create a safe discharge plan, and would require the plan to include a list of the

resident's posteviction needs, goals, and preferences, and a list of discharge locations that meet specified criteria, such as being financially practicable for the resident.

SB 523 (Seyarto R) California Earthquake Authority: commission.

Current Text: Amended: 3/24/2025 [html](#) [pdf](#)

Location: 5/1/2025-S. 2 YEAR

Summary: Existing law establishes the California Earthquake Authority (CEA), administered under the authority of the Insurance Commissioner and governed by a 3-member governing board, to transact insurance in this state as necessary to sell policies of basic residential earthquake insurance. Under existing law, the CEA's governing board is advised by an appointed advisory panel. This bill would require the CEA to establish a commission, to convene no later than April 1, 2026, to consider expanding the authority. The bill would require the commission to be composed of the board members or their designees. The bill would also require the commission to explore specified topics, including financial estimates for statewide earthquake threats. The bill would require the commission to conclude its work no later than April 1, 2027, and to submit a report to the Legislature no later than June 1, 2027, on the feasibility of creating a disaster insurance program in California. The bill would repeal these provisions on June 1, 2031.

SB 664 (Ochoa Bogh R) Vehicles: public safety: Blue Envelope Program.

Current Text: Introduced: 2/20/2025 [html](#) [pdf](#)

Location: 5/1/2025-S. 2 YEAR

Summary: Current law requires the Department of Motor Vehicles to prescribe and provide suitable forms of applications, certificates of ownership, registration cards, driver's licenses, and all other forms that are deemed necessary. This bill would, by January 1, 2027, require the department, in consultation with relevant stakeholders, to develop a Blue Envelope Program. Under the program, the bill would require the blue envelope to contain specified information for requesters with a condition or disability, as specified. The bill would also authorize others, including a parent or legal guardian of a passenger with a disability, to request a blue envelope.

SB 814 (Rubio D) Homelessness.

Current Text: Introduced: 2/21/2025 [html](#) [pdf](#)

Location: 5/23/2025-S. 2 YEAR

Summary: Existing law requires the Governor to create a California Interagency Council on Homelessness for specified purposes, including to create partnerships among various entities, like participants in the United States Department of Housing and Urban Development's Continuum of Care Program, and to identify mainstream resources, benefits, and services that can be accessed to prevent and end homelessness in California. This bill would instead require the council to evaluate the above-described goals at least every year. This bill contains other existing laws.

SCR 33 (Padilla D) GM1 Gangliosidosis Awareness Day.

Current Text: Chaptered: 7/3/2025 [html](#) [pdf](#)

Location: 7/3/2025-S. CHAPTERED

Summary: Would declare May 23, 2025, as GM1 Gangliosidosis Awareness Day in California.

Memo

[Position Statement scr 33 \(04/04/2025\)](#)

Total Measures: 29

Total Tracking Forms: 29

7/28/2025 1:11:49 PM



San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 (858) 576-2996 www.sdrc.org

Date: July 30, 2025

To: Members, SDICDSI Personnel Committee
Virginia Bayer
Pamela Ehlers
James Gonzalez
Julie Randolph
Kimberly Rucker

From: Laura Oakes, Chair

Subject: Personnel Committee Meeting

The next Personnel Committee meeting will be held on Tuesday, August 12, 2025 at 10:00 a.m. This meeting will be in **Suite 203** or via Zoom if you prefer. The proposed agenda is attached.

If you have any questions or are unable to attend the meeting, please contact Christine Lux-Whiting at (858) 503-4441.

xc: Mark Klaus
Kimberly Steitz
Christine Lux-Whiting
Mary Nieves



San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 (858) 576-2996 www.sdrc.org

Personnel Committee Meeting
Raymond M. Peterson, M.D. Office Building
4355 Ruffin Road, San Diego, CA 92123

In-Person/Virtual Meeting

August 12, 2025

10:00 A.M. – 11:00 P.M.

AGENDA

1. Call to Order
2. Approval of the June 2025 Meeting Minutes (Enclosure 1)
3. Delinquent Performance Reviews
4. New Hire, Exit, and Turnover Reports (Enclosure 2)
5. 1000 Employee Milestone Estimate
6. Public Records Act Analyst
7. Longevity/RCPM stipends
8. QI Teams
9. Employee Satisfaction Survey
10. EEOC Update
11. Other Business



San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 (858) 576-2996 www.sdrc.org

PERSONNEL COMMITTEE MINUTES

June 10, 2025

Members Present: Virginia Bayer (via Zoom), Laura Oakes, Julie Randolph, Kimberly Rucker
Members Absent: James Gonzalez, Pamela Ehlers
Staff Present: Christine Lux-Whiting, Kate Kinnamont, Kimberly Steitz, Tami West Harman

1. **CALL TO ORDER**
Laura Oakes called the meeting to order.
2. **MEETING MINUTES**
The minutes from the last Personnel Committee meeting held in May 2025 were approved.
3. **DELINQUENT EMPLOYEE PERFORMANCE REVIEWS**
There were zero performance reviews overdue by 60 days, excluding employees on leave.
4. **NEW HIRE, EXIT AND TURNOVER REPORTS**
In May 2025, there were 15 new hires and 11 departures.
5. **HANDBOOK REVISIONS**
Discussed additional revisions to Employee Handbook to go to full Board today.
6. **CATASTROPHIC LEAVE BANK**
Discussed uses of catastrophic leave program and employee donation for upcoming fiscal year.
7. **VACATION BUYBACK**
Employees may cash out up to 80 hours of accrued vacation as long as 40 hours are retained.
8. **WELLNESS ACTIVITIES**
The Wellness Committee plans activities for staff to promote health and wellness. These are funded by United Healthcare.
9. **OTHER BUSINESS**
The first ever staff picnic at the Zoo is highly anticipated.

The meeting was adjourned by Laura Oakes.

Respectfully Submitted,

Christine Lux-Whiting
Director, Human Resources

SD-ICDSI NEW HIRE REPORT

July 1, 2024 - June 30, 2025

Enclosure 2

<u>DOH</u>	<u>TITLE</u>	<u>UNIT/DEPT</u>
6/25/2025	Service Coordinator	Unit 3
6/23/2025	Service Coordinator	Unit 46
6/23/2025	Service Coordinator	Unit 41
6/23/2025	Service Coordinator	Unit 44
6/9/2025	Service Coordinator	Unit 16
6/9/2025	Service Coordinator	Unit 36
6/9/2025	Service Coordinator	Unit 30
6/9/2025	Administrative Support Assistant	IVSG
5/27/2025	Service Coordinator	Unit 12
5/27/2025	Service Coordinator	Unit 53
5/27/2025	Service Coordinator	Unit 52
5/27/2025	Service Coordinator	Unit 56
5/27/2025	Service Coordinator	Unit 18
5/27/2025	Service Coordinator	Unit 52
5/27/2025	Service Coordinator	Unit 49
5/27/2025	Service Coordinator	Unit 4
5/27/2025	Intake Coordinator	Intake
5/27/2025	Service Coordinator	Unit 13
5/27/2025	Coordinator Psych Svcs.	Clinical Svcs.
5/27/2025	Service Coordinator	Unit 49
5/12/2025	Nurse Clinician	Clinical Svcs.
5/12/2025	Service Coordinator	Unit 49
5/12/2025	Service Coordinator	Unit 9
4/28/2025	Service Coordinator	Unit 38
4/28/2025	Service Coordinator	Intake
4/28/2025	Service Coordinator	Unit 32
4/28/2025	Service Coordinator	Unit 53
4/28/2025	Service Coordinator	Unit 4
4/14/2025	Service Coordinator	Unit 32
4/14/2025	Service Coordinator	Unit 2
4/14/2025	Service Coordinator	Unit 11
4/14/2025	Service Coordinator	EC Floater
4/14/2025	Service Coordinator	Unit 45
4/14/2025	Service Coordinator	Unit 53
4/14/2025	Service Coordinator	Unit 8
4/14/2025	Service Coordinator	Unit 10

SD-ICDSI NEW HIRE REPORT

July 1, 2024 - June 30, 2025

Enclosure 2

4/14/2025	Service Coordinator	Unit 39
4/14/2025	Service Coordinator	Unit 49
4/7/2025	Administrative Support Assistant	ISG
4/7/2025	Administrative Support Assistant	NISG
4/7/2025	Administrative Support Assistant	IVSG
4/7/2025	Coordinator Nursing Svcs.	Clinical Svcs.
4/7/2025	Administrative Support Assistant	NISG
3/31/2025	Service Coordinator	Unit 49
3/31/2025	Service Coordinator	Unit 52
3/31/2025	POS Auth. Specialist	Business Svcs.
3/31/2025	Service Coordinator	Unit 53
3/31/2025	Service Coordinator	Unit 52
3/31/2025	Service Coordinator	Unit 48
3/31/2025	Service Coordinator	Unit 53
3/31/2025	Service Coordinator	Unit 13
3/31/2025	Service Coordinator	Unit 42
3/17/2025	Service Coordinator	Unit 42
3/17/2025	Service Coordinator	Unit 43
3/17/2025	Service Coordinator	Unit 13
3/17/2025	Service Coordinator	Unit 1
3/17/2025	Service Coordinator	Unit 34
3/17/2025	Service Coordinator	Unit 18
3/17/2025	Service Coordinator	Unit 18
3/17/2025	Service Coordinator	Unit 52
3/17/2025	Service Coordinator	Unit 54
3/17/2025	Service Coordinator	Unit 56
3/17/2025	Service Coordinator	Unit 49
3/17/2025	Service Coordinator	Unit 11
3/17/2025	Service Coordinator	Unit 31
3/17/2025	Service Coordinator	Unit 21
3/3/2025	Service Coordinator	Unit 53
3/3/2025	Service Coordinator	Unit 43
3/3/2025	Service Coordinator	Unit 30
3/3/2025	Service Coordinator	Unit 18
3/3/2025	Service Coordinator	Unit 7
3/3/2025	Service Coordinator	Unit 10
2/18/2025	Service Coordinator	Unit 12

SD-ICDSI NEW HIRE REPORT

July 1, 2024 - June 30, 2025

Enclosure 2

2/18/2025	POS Self Det. Coordinator	Business Svcs.
2/18/2025	Service Coordinator	Unit 44
2/3/2025	Administrative Support Assistant	SBSG
1/6/2025	Service Coordinator	Unit 44
1/6/2025	Service Coordinator	Unit 15
1/6/2025	Service Coordinator	Unit 53
1/6/2025	Service Coordinator	Unit 43
1/6/2025	Service Coordinator	Unit 38
12/30/2024	Service Coordinator	Unit 48
12/30/2024	POS Self Det. Coordinator	Business Svcs.
12/9/2024	Resource Coordinator	Community Svcs.
12/9/2024	Service Coordinator	Unit 11
12/9/2024	Service Coordinator	Unit 15
12/9/2024	Internal Auditor/Fiscal Monitor	Business Svcs.
12/9/2024	Mktg/Events Coordinator	Marketing/Communications
12/9/2024	Service Coordinator	Unit 6
12/9/2024	Service Coordinator	Unit 11
12/9/2024	Director of Equity	Executive
12/9/2024	Service Coordinator	Unit 44
12/9/2024	Service Coordinator	Unit 44
11/25/2024	Service Coordinator	Unit 28
11/25/2024	Service Coordinator	Unit 34
11/25/2024	Service Coordinator	Unit 41
11/25/2024	Service Coordinator	Unit 28
11/25/2024	Service Coordinator	Unit 20
11/25/2024	Service Coordinator	Unit 39
11/18/2024	Service Coordinator	Unit 41
11/4/2024	Service Coordinator	Unit 46
10/28/2024	Fiscal Assistant	Business Svcs.
10/28/2024	Service Coordinator	Unit 9
10/28/2024	Service Coordinator	Unit 44
10/28/2024	Service Coordinator	Unit 12
10/28/2024	Service Coordinator	Unit 44
10/28/2024	Service Coordinator	Unit 34
10/24/2024	Service Coordinator	Unit 3
10/14/2024	Administrative Support Assistant	ISG
10/7/2024	Service Coordinator	Unit 11

SD-ICDSI NEW HIRE REPORT

July 1, 2024 - June 30, 2025

Enclosure 2

10/7/2024	Administrative Support Assistant	SISG
9/30/2024	Director, Clinical Services	Clinical
9/30/2024	Service Coordinator	Unit 46
9/30/2024	Service Coordinator	Unit 30
9/30/2024	Service Coordinator	Unit 18
9/30/2024	Service Coordinator	Unit 46
9/16/2024	Service Coordinator	Unit 5
9/16/2024	Service Coordinator	Unit 44
9/16/2024	Service Coordinator	Unit 45
9/16/2024	Service Coordinator	Unit 43
9/16/2024	Service Coordinator	Unit 12
9/16/2024	Service Coordinator	Unit 52
9/16/2024	Service Coordinator	Unit 16
9/16/2024	Service Coordinator	Unit 18
9/9/2024	Service Coordinator	Unit 18
9/9/2024	Service Coordinator	Unit 21
9/9/2024	POS Auth. Specialist	Business Svcs.
9/9/2024	Service Coordinator	Unit 44
9/9/2024	Service Coordinator	Unit 52
9/9/2024	Service Coordinator	Unit 9
8/19/2024	Service Coordinator	Unit 44
8/19/2024	Service Coordinator	Unit 12
8/19/2024	Service Coordinator	Unit 5
8/19/2024	Application Analyst	IT
8/12/2024	Application Analyst	IT
8/12/2024	Service Coordinator	Unit 26
8/12/2024	Service Coordinator	Unit 52
8/5/2024	Service Coordinator	Unit 55
8/5/2024	Service Coordinator	Unit 13
8/5/2024	Service Coordinator	Unit 41
8/5/2024	Service Coordinator	Unit 53
8/5/2024	Service Coordinator	Unit 54
8/5/2024	Service Coordinator	Unit 46
8/5/2024	Service Coordinator	Unit 53
8/5/2024	Service Coordinator	Unit 46
8/5/2024	Service Coordinator	Unit 46
7/29/2024	Service Coordinator	Unit 1

SD-ICDSI NEW HIRE REPORT

July 1, 2024 - June 30, 2025

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7/29/2024	Service Coordinator	Unit 46
7/29/2024	Service Coordinator	Unit 48
7/29/2024	Service Coordinator	Unit 52
7/29/2024	Service Coordinator	Unit 35
7/29/2024	Service Coordinator	Unit 54
7/22/2024	Service Coordinator	Unit 34
7/15/2024	Service Coordinator	Unit 41
7/15/2024	Service Coordinator	Unit 22
7/15/2024	Service Coordinator	Unit 16
7/15/2024	Service Coordinator	Unit 12
7/15/2024	Service Coordinator	Unit 46
7/15/2024	Administrative Support Assistant	KMSG2
7/15/2024	Service Coordinator	Unit 44
7/15/2024	Service Coordinator	Unit 52
7/15/2024	Service Coordinator	Unit 7
7/8/2024	Service Coordinator	Unit 52
7/8/2024	Service Coordinator	Unit 13
7/8/2024	Service Coordinator	SB Float
7/8/2024	Service Coordinator	Unit 18
7/8/2024	Service Coordinator	Unit 22
7/8/2024	Service Coordinator	Unit 29
7/8/2024	Service Coordinator	Unit 20
7/8/2024	Service Coordinator	Unit 49
7/8/2024	Service Coordinator	Unit 11
7/1/2024	Service Coordinator	Unit 11
7/1/2024	Financial Analyst	Business Svcs.
7/1/2024	Administrative Support Assistant	Intake Supp. Group
7/1/2024	Administrative Support Assistant	Intake Supp. Group
7/1/2024	Service Coordinator	Unit 3
7/1/2024	Service Coordinator	Unit 45
7/1/2024	Service Coordinator	Unit 52
	Service Coordinator	Unit 45

SD-ICDSI NEW HIRE REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

<u>MONTH</u>	<u>TITLE</u>	<u>DEPARTMENT</u>	<u>TOTAL</u>					
Jun. 2025	Service Coordinators - 7	Client Svcs.						
	Administrative Support Assistants - 1	Program Supports	8					
May. 2025	Service Coordinators - 12	Client Svcs.						
	Intake Coordinators - 1	Clinical Svcs.						
	Nurse Clinicians - 1	Clinical Svcs.						
	Coordinator, Psych Svcs. - 1	Clinical Svcs.	15					
Apr. 2025	Service Coordinators - 15	Client Svcs.						
	Coordinator Nursing Svcs. - 1	Clinical Svcs.						
	Administrative Support Assistants - 4	Program Supports	20					
Mar. 2025	Service Coordinators - 28	Client Svcs.						
	POS Auth Specialist - 1	Business Svcs.	29					
Feb. 2025	Service Coordinators - 2	Client Svcs.						
	POS Self Det. Coordinator - 1	Business Svcs.						
	Administrative Support Assistants - 1	Program Supports	4					
Jan. 2025	Service Coordinators - 5	Client Svcs.						
	Administrative Support Assistants - 1	Program Supports	6					
Dec. 2024	Service Coordinators - 8	Client Svcs.						
	POS Self Det. Coordinator - 1	Business Svcs.						
	Internal Auditor/Fiscal Monitor - 1	Business Svcs.						
	Mktg/Events Coordinator - 1	Mkt/Communications						
	Director of Equity - 1	Executive	12					
Nov. 2024	Service Coordinators - 7	Client Svcs.						
	Fiscal Asst. - 1	Business Svcs.	8					
Oct. 2024	Service Coordinators - 7	Client Svcs.						
	Administrative Support Assistants - 2	Program Supports						
	Director, Clinical Services - 1	Clinical Svcs.	10					

SD-ICDSI NEW HIRE REPORT
July 1, 2024 - June 30, 2025

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Sept. 2024	Service Coordinators - 24	Client Svcs.						
	POS Auth. Specialist - 1	Business Svcs.	25					
Aug. 2024	Service Coordinators - 14	Client Svcs.						
	Application Analysts - 2	IT	16					
Jul-24	Service Coordinators - 28	Client Svcs.						
	Administrative Support Assistants - 3	Program Supports						
	Financial Analyst - 1	Business Svcs.	32					

SD-ICDSI NEW HIRE REPORT

July 1, 2025 - June 30, 2026

Enclosure 2

<u>DOH</u>	<u>NAME</u>	<u>UNIT/DEPT</u>
7/21/2025	Brooke Akana	Unit 45
7/21/2025	Elsie Gutierrez	Unit 32
7/21/2025	Kiki Valdez	Unit 1
7/21/2025	Angela Walter	Unit 28
7/21/2025	Brigid Wheeler	Unit 28
7/14/2025	Hivanna Prado	ECSG
7/14/2025	Ronald Forrest	ECSG
7/7/2025	Mia Padilla	Unit 49
7/7/2025	Destiny Sandoval	Unit 52
7/7/2025	Dayanayra Gonzalez	Unit 52
7/7/2025	Kloe Abutin	Unit 19
7/7/2025	Amy Cibrian	Unit 44
7/7/2025	Viriana Nevarez	SBSG
7/7/2025	Shane Hughes	Comm. Svcs.
7/7/2025	Lizzeth Serna	KMSG

Enclosure 2

Enclosure 2

Enclosure 2

SD-ICDSI EXIT REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

DOT	TERM REASON	DOH	LENGTH OF SERVICE	TITLE
6/17/2025	Moving	6/17/2024	1 year	SC
6/30/2025	Personal	1/8/2024	1 year, 5 months	ASA
6/30/2025	Retirement	7/14/2014	10 years, 11 months	FacM
6/23/2025	Personal	6/23/2025	8 years, 3 months	SC
6/13/2025	Moving	2/18/2025	0 years, 4 months	SC
6/4/2025	Retirement	6/27/2005	20 years	PM
6/2/2025	School	10/2/2023	1 year, 8 months	SC
5/30/2025	Another job	3/17/2025	0 years, 2 months	SC
5/29/2025	Another job	7/15/2024	0 years, 10 months	SC
5/27/2025	Personal	11/25/2024	0 years, 6 months	SC
5/23/2025	Another job	7/1/2024	0 years, 11 months	SC
5/23/2025	Moving	11/6/2023	1 year, 6 months	SC
5/21/2025	Personal	5/21/2025	0 years, 5 months	SC
5/16/2025	Another job	11/15/2021	3 years, 6 months	ASA
5/8/2025	Moving	9/18/2023	1 year, 7 months	SC
5/8/2025	Another job	6/24/2021	3 years, 11 months	SC
5/1/2025	Personal	4/25/2022	3 years	SC
4/30/2025	Another job	4/25/2025	1 year	SC
4/22/2025	Moving	5/10/2021	3 years, 11 months	SC
4/21/2025	Personal	3/4/2024	1 year, 1 month	SC
4/11/2025	Another job	10/14/2024	0 years, 7 months	SC
4/10/2025	Personal	3/17/2025	0 years, 3 weeks	SC
4/10/2025	Another job	12/9/2024	0 years, 4 months	SC
3/31/2025	Moving	9/18/2023	1 year, 6 months	ASA
3/27/2025	Retirement	3/29/2001	24 years	ATC
3/21/2025	Another job	8/28/2023	1 year, 7 months	SC
3/10/2025	Moving	9/12/2022	2 years, 6 months	SC
3/6/2025	School	4/3/2023	1 year, 11 months	SC
2/27/2025	Retirement	2/2/1998	27 years, 0 months	SC
2/27/2025	Another job	3/25/2024	0 years, 11 months	SC
2/24/2025	Moving	9/7/2021	3 years, 5 months	Acct. Coord
2/13/2025	Personal	5/20/2024	0 years, 9 months	Res.Coord.
2/7/2025	Another job	5/13/2024	0 years, 8 months	SC

SD-ICDSI EXIT REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

DOT	TERM REASON	DOH	LENGTH OF SERVICE	TITLE
1/31/2025	School	3/6/2023	1 year, 10 months	SC
1/30/2025	Personal	7/11/2022	2 years, 6 months	ASA
1/24/2025	Another job	7/1/2019	5 years, 6 months	SC
1/22/2025	Another job	10/29/2007	17 years, 3 months	HCBS Sp.
1/16/2025	Moving	7/1/2024	0 years, 6 months	Fin.Analyst
1/15/2025	Another job	1/22/2024	1 year, 0 months	SC
1/9/2025	Another job	2/26/2024	0 years, 10 months	SC
12/26/2024	Personal	7/15/2024	0 years, 5 months	SC
12/25/2024	Moving	9/12/2022	2 years, 3 months	SC
12/19/2024	School	10/16/2023	1 year, 2 months	SC
12/1/2024	Personal	12/17/2018	6 years, 0 months	ADCS
11/29/2024	Another job	5/13/2019	5 years, 6 months	SC
11/13/2024	Another job	11/21/2022	2 years, 0 months	SC
11/6/2024	Specified Term Employee	6/24/2024	0 years, 4 months	ESC
10/31/2024	Personal	3/8/2021	3 years, 7 months	SC
10/31/2024	Another job	10/10/2022	2 years, 0 months	SC
10/24/2024	Personal	6/6/2022	2 years, 4 months	SC
10/24/2024	Another job	5/20/2024	0 years, 5 months	SC
10/21/2024	Another job	9/30/2024	21 days	SC
10/17/2024	Another job	2/27/2023	1 year, 8 months	SC
10/10/2024	Another job	7/6/2021	3 years, 3 months	Staff Psych
10/10/2024	Another job	8/14/2023	1 year, 2 months	Staff Psych
10/10/2024	Moving	10/10/2022	2 years, 0 months	SC
10/4/2024	Another job	3/13/2023	1 year, 7 months	SC
10/4/2024	Personal	6/28/2021	3 years, 3 months	PM
10/3/2024	Another job	4/4/2022	2 years, 6 months	SC
10/1/2024	Moving	8/29/2022	1 year , 1 month	SC
9/27/2024	Personal	7/1/2019	5 years, 3 months	CPS
9/27/2024	Personal	3/31/2008	16 years, 6 months	SC

Enclosure 2

<u>DOT</u>	<u>TERM REASON</u>	<u>DOH</u>	<u>LENGTH OF SERVICE</u>	<u>TITLE</u>
9/20/2024	Another job	4/15/2019	5 years, 5 months	SC
9/13/2024	Another job	3/14/2022	2 years, 5 months	CNS
9/12/2024	Another job	2/26/2024	0 years, 6 months	POSSDC
9/12/2024	Another job	11/29/2021	2 years, 9 months	SC
9/12/2024	Moving	9/13/2021	3 years	SC
9/11/2024	Moving	12/6/2021	2 years, 11 months	SC
8/30/2024	Unknown	8/28/2023	1 year	SC
8/30/2024	Another job	8/9/2021	3 years, 1 month	SC
8/29/2024	School	8/7/2023	2 years	SC
8/29/2024	Moving	3/6/2023	1 year, 5 months	SC
8/16/2024	Another job	8/5/2024	1 week, 4 days	SC
8/9/2024	Another job	2/1/2021	3 years, 6 months	SC
8/9/2024	Personal	10/10/2001	22 years, 10 months	SC
8/2/2024	Another job	5/6/2024	0 years, 3 months	SC
8/2/2024	School	8/15/2022	2 years	SC
8/1/2024	Another job	4/13/2020	4 years, 3 months	SC
7/31/2024	Another job, Lic. Hrs.	9/17/2018	5 years, 10 months	SC
7/31/2024	Retirement	7/16/1990	34 years	Hir. Mgr.
7/31/2024	Retirement	6/28/1979	45 years. 1 month	Mgr. SD
7/31/2024	Retirement	7/6/1999	25 years	PM
7/26/2024	Another job	4/13/2009	15 years, 3 months	HDSC
7/26/2024	Moving out of state	12/16/2019	4 years, 7 months	SC
7/26/2024	School	8/29/2022	1 year, 11 months	SC
7/16/2024	Retirement	6/29/1998	26 years, 1 month	ASA
7/12/2024	Retirement	7/1/2019	5 years	Trust.Asst.
7/5/2024	Retirement	1/8/2002	22 years, 6 months	PM

SD-ICDSI EXIT REPORT

July 1, 2024 - June 30, 2025

Enclosure 2

<u>MONTH</u>	<u>TITLE</u>	<u>DEPARTMENT</u>	<u>TOTAL</u>
Jun. 2025	Service Coordinators - 5	Client Svcs.	
	Program Managers - 1	Client Svcs.	
	Facilities Manager - 1	Bus. Svcs.	
	Administrative Support Assistant - 1	Program Supports	8
May. 2025	Service Coordinators - 9	Client Svcs.	
	Intake Coordinator - 1	Clinical Svcs.	
	Administrative Support Assistant - 1	IVSG	11
Apr. 2025	Service Coordinators - 8	Client Svcs.	8
Mar. 2025	Service Coordinators - 3	Client Services	
	Asst. Transportation Coordinator - 1	Comm. Svcs.	
	Administrative Support Assistant - 1	Program Supports	5
Feb. 2025	Service Coordinators - 3	Client Services	
	Res. Coordinator - 1	Comm. Svcs.	
	Acct. Coordinator - 1	Business Svcs.	5
Jan. 2025	Service Coordinators - 4	Client Services	
	Administrative Support Assistants - 2	Program Supports	
	Financial Analyst - 1	Business Svcs.	
	HCBS Specialist - 1	Comm. Svcs.	8
Dec. 2024	Service Coordinators - 5	Client Services	
	Asst. Dir. Client Svcs. -1	Client Services	6
Nov. 2024	Service Coordinators - 4	Client Services	
	HDS Coordinator - 1	Comm. Services	5
Oct. 2024	Service Coordinators - 11	Client Services	
	Program Managers - 2	Client Services	
	Staff Psychologists - 2	Clinical Svcs.	
	Administrative Support Assistants - 2	Program Supports	17

SD-ICDSI EXIT REPORT

July 1, 2024 - June 30, 2025

Enclosure 2

Sept. 2024	Service Coordinators - 9	Client Svcs.	
	POS Self Det. Prog. Coord. - 1	Business Svcs.	
	Nurse Supervisor - 1	Clinical Svcs.	
	Clinical Psychologist Supervisor - 1	Clinical Svcs.	
	Pub. Info Coord. - 1	Marketing/Comm.	
	Administrative Support Assistants - 1	Program Supports	14
Aug. 2024	Service Coordinators - 10	Client Svcs.	10
Jul. 2024	Service Coordinators - 3	Client Svcs.	
	Program Managers - 3	Client Svcs.	
	Hab Coordinator - 1	Comm. Svcs.	
	Administrative Support Assistants - 1	Program Supports	
	Trust Assistant - 1	Business Svcs.	
	Manager Software Dev. - 1	IT	10

SD-ICDSI EXIT REPORT

Enclosure 2

July 1, 2024 - June 30, 2025

<u>DOT</u>	<u>TERM REASON</u>	<u>DOH</u>	<u>LENGTH OF SERVICE</u>	<u>TITLE</u>
7/31/2025	Personal	6/23/2025	0 years, 1 months	SC
7/31/2025	Personal	4/11/2022	3 years, 3 months	SC
7/31/2025	Moving	8/22/2022	2 years, 11 months	SC
7/31/2025	School	7/29/2024	1 year	SC
7/29/2025	Personal	9/9/2024	0 years, 10 months	SC
7/24/2025	Another job	6/7/2021	4 years, 1 month	SC
7/18/2025	Personal	4/14/2025	0 years, 3 months	SC
7/18/2025	School	8/5/2024	0 years, 11 months	SC
7/17/2025	Another job (Vend)	8/27/2007	17 years, 11 months	SC
7/11/2025	Law School	4/8/2024	1 year, 3 months	SC
7/11/2025	Moving	2/27/2023	2 years, 4 months	SC
7/9/2025	Terminated	6/10/2024	1 year, 1 month	SC
7/8/2025	Personal	3/4/2024	1 year, 4 months	SC
7/8/2025	Another job	6/23/2025	2 weeks	SC
7/5/2025	Personal	10/31/2022	2 years, 8 months	SC
7/2/2025	Another job	7/16/2018	6 years, 11 months	SC
7/1/2025	Personal	7/17/2017	8 years	Beh.Spec.

SD-ICDSI EXIT REPORT
July 1, 2025 - June 30, 2026

Enclosure 2

<u>MONTH</u>	<u>TITLE</u>	<u>DEPARTMENT</u>	<u>TOTAL</u>
Jul. 2025	Service Coordinators - 16	Client Svcs.	
	Behavior Specialists - 1	Clinical Svcs.	17

SD-ICDSI TURNOVER REPORT
July 1, 2024 - June 30, 2025

	Average Number of Employees	New Job, School, Personal, Other	Moved, Retirement, Death	Total Number of Departures	Year to Date Turnover %
July	933	3	7	10	
August	949	9	1	10	
September	955	12	2	14	
October	945	16	1	17	
November	950	5	0	5	
December	950	3	1	4	
January	956	7	1	8	
February	956	3	2	5	
March	980	2	3	5	
April	989	7	1	8	
May	989	9	2	11	
June	990	13	2	15	
Totals	962	89	23	112	11.6%

8/1/2025

8/1/2025



San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
858-576-2996 / www.sdrc.org

Serving individuals with developmental disabilities in San Diego and Imperial Counties

MEMORANDUM

DATE: August 5, 2025

TO: Members, Nominating and Bylaws Committee
Tessie Bradshaw
Pamela Ehlers
Laura Oakes
Norma Ramos
Matthew Storey

FROM: Virginia Bayer, Chair

The Nominating and Bylaws Committee will meet following the Board meeting on Tuesday, August 5, 2025, at 1:30 p.m. in Suite 205 Conference Room and via Zoom.

The proposed agenda is as follows:

1. Call to Order
2. Approval of Committee Meeting Minutes of May 13, 2025
3. Review of Applications for Board Membership
4. Board Officers for 2026
5. Adjourn

c: David Hadacek

SD-ICDSI TURNOVER REPORT
July 1, 2025 - June 30, 2026

	Average Number of Employees	New Job, School, Personal, Other	Moved, Retirement, Death	Total Number of Departures	Year to Date Turnover %
July	993	2	15	17	
August					
September					
October					
November					
December					
January					
February					
March					
April					
May					
June					
Totals	993	2	15	17	1.7%

8/1/2025

8/1/2025



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Serving individuals with developmental disabilities in San Diego and Imperial Counties

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c: David Hadacek



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4355 Ruffin Road, San Diego, CA 92123
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Serving individuals with developmental disabilities in San Diego and Imperial Counties

**Nominating and Bylaws Committee Meeting
Minutes
Tuesday, May 6, 2025**

Members Present: Virginia Bayer, Tessie Bradshaw, David Hadacek, Norma Ramos, and Cali Williams

Staff Present: Mark Klaus and Bonnie Sebright

Virgina Bayer, called the meeting of the Nominating and Bylaws Committee to order at 1:25 p.m.

1. Approval of the Minutes

The Nominating and Bylaws Committee reviewed the minutes of the October 8, 2024, meeting. The minutes were approved with the corrections.

2. Annual Review of Bylaws

Members of the Nominating and Bylaws Committee reviewed and discussed the agency counsel's proposed revisions to the bylaws. It was decided to remove section 3.19.

MOTION: M/S/C that the Nominating and Bylaws Committee will recommend the Board approve the proposed revisions to the corporate bylaws.

3. Review of Board Composition and Member Terms

Committee members deliberated on engaging with Board Members who are scheduled for re-election in 2026 to assess their interest in continuing their tenure for an additional term. In addition, Eric Rascon, who represents Imperial County, will be retiring. Committee members engaged in discussions regarding recruitment efforts within Imperial County.

4. Review Applications for Board Membership

After the discussion, the committee reviewed potential candidates for the upcoming vacant positions on the Board.

5. Adjournment

The meeting was adjourned at 2:07 p.m.



San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 · (858) 576-2996 · www.sdrc.org

BOARD OF DIRECTORS

Effective February 1, 2025

Officers

Chair	David Hadacek
Vice-Chair	Tessie Bradshaw
Secretary	Virginia Bayer
Treasurer	Matthew Storey
ARCA Rep	Terri Colachis
Immediate Past Chair	Norma Ramos
Member at Large	Chris Hodge

Members

Elmo Dill	Julie Randolph
Pamela Ehlers	Erik Rascon
Wendy Forkas	Kimberly Rucker
James Gonzalez	Mark Uyeda
Yasuko Mason	Taylor Wiesner
Laura Oakes	Cali Williams

	SDICDSI Board Member Terms	2/1/2025			
	Name	First Term	Second Term	Third Term	Action 1/2026
	Pamela Ehlers	Feb 2025~Jan 2026	Feb 2026~Jan 2029	Feb 2029~Jan 2032	Up for Reelection
	Yasuko Mason	Feb 2025~Jan 2026	Feb 2026~Jan 2029	Feb 2029~Jan 2032	Up for Reelection
	Cali Williams	Feb 2025~Jan 2026	Feb 2026~Jan 2029	Feb 2029~Jan 2032	Up for Reelection
	Taylor Wiesner	Feb 2025~Jan 2026	Feb 2026~Jan 2029	Feb 2029~Jan 2032	Up for Reelection
	Elmo Dill	Feb 2024~Jan 2025	Feb 2025~Jan 2028	Feb 2028~Jan 2031	
	Laura Oakes	Feb 2024~Jan 2025	Feb 2025~Jan 2028	Feb 2028~Jan 2031	
	Mark Uyeda	Feb 2024~Jan 2025	Feb 2025~Jan 2028	Feb 2028~Jan 2031	
	James Gonzalez	Feb 2023~Jan 2024	Feb 2024~Jan 2027	Feb 2027~Jan 2030	
	David Hadacek	Feb 2023~Jan 2024	Feb 2024~Jan 2027	Feb 2027~Jan 2030	
	Virgina Bayer	Feb 2022~Jan 2023	Feb 2023~Jan 2026	Feb 2026~Jan 2029	Up for Reelection
	Julie Randolph	Feb 2022~Jan 2023	Feb 2023~Jan 2026	Feb 2026~Jan 2029	Up for Reelection
	Tessie Bradshaw	Feb 2021~Jan 2022	Feb 2022~Jan 2025	Feb 2025~Jan 2028	
	Matthew Storey	Feb 2021~Jan 2022	Feb 2022~Jan 2025	Feb 2025~Jan 2028	
	Terri Colachis	Feb 2020~Jan 2021	Feb 2021~Jan 2024	Feb 2024~Jan 2027	
	Chris Hodge	Feb 2020~Jan 2021	Feb 2021~Jan 2024	Feb 2024~Jan 2027	
	Kimberly Rucker	Feb 2020~Jan 2021	Feb 2021~Jan 2024	Feb 2024~Jan 2027	
	Norma Ramos	Feb 2019~Jan 2020	Feb 2020~Jan 2023	Feb 2023~Jan 2026	Retires
	Erik Rascon	Feb 2019~Jan 2020	Feb 2020~Jan 2023	Feb 2023~Jan 2026	Retires
	Wendy Forkas	Feb 2025~Jan 2026			



San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 · (858) 576-2996 · www.sdrc.org

Board of Directors Application

Name: a s

Home Address: San Marcos

Telephone Number:

E-Mail Address:

Employer: none

Occupation: none

Describe how you have demonstrated an interest in or knowledge of developmental disabilities.

i have specail neends and i vonteery in a class room for people who have special need's its was so fun and beatiful

Describe in which area or areas of developmental disability you have experience (intellectual disability, cerebral palsy, epilepsy, autism, Early Start, other).

learning and other special needs i have

Are you a client of the San Diego Regional Center? (Check one)

Yes ☒ No ☐

Do you have a family member who is a client of the San Diego Regional Center? (Check one)

Yes ☐ No ☒

If you checked yes, how is the client related to you?

The work of the Board of Directors requires consistent attendance at monthly meetings of the Board of Directors and Board committees. These meetings may take as long three to four hours, in the middle of the day, usually on Tuesdays. Will your schedule allow you to attend Board and committee meetings? Please explain.

yes i am free on tuedays cant waite

Do you have experience as a member of a Board of Directors or any other governing body? Please explain.

my first time being part of a board

Which of the following skills do you have? (Check as many as apply)

DEVELOPMENTAL DISABILITY PROGRAM SKILLS ☒

LEGAL ☐ **MANAGEMENT** ☐ **PUBLIC RELATIONS** ☐ **OTHER** ☒

Please describe in more detail how your skills are related to developmental disabilities.

i have a have special needs and i go to a day program for people who have special needs i volunteer at churches and clean and vacuum and clean tables and window seals and sweep the floor

Why would you like to be a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center)?

because i have special needs and i love advocating for myself and everyone who has special needs and i want more inclusion for us and we need therapy dogs that's what i am fighting for to

What is your ethnicity?

white

By signing this application you certify that you are not employed by or a member of the governing body of any entity from which the San Diego Regional Center purchases services, and that you are not aware of any conflict of interest that would result from you being a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center).

Signature

5/20/2025

Date



San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 · (858) 576-2996 · www.sdrc.org

Board of Directors Application

Name: [REDACTED]

Home Address: [REDACTED]

Brawley, CA 92027

Telephone Number: [REDACTED]

E-Mail Address: [REDACTED]

Employer: N/A

Occupation: Not Employed

Describe how you have demonstrated an interest in or knowledge of developmental disabilities.

Being a client of SDRC as well as participating in People First have provided knowledge of developmental disabilities as well as services provided to people with DD.

Describe in which area or areas of developmental disability you have experience (Intellectual disability, cerebral palsy, epilepsy, autism, Early Start, other).

I have knowledge on ID, CP, Epilepsy, and ASD. I'm willing to learn more about the Early Start program to advocate and make informed decisions.

Are you a client of the San Diego Regional Center? (Check one)

Yes ☒ No ☐

Do you have a family member who is a client of the San Diego Regional Center? (Check one)

Yes ☐ No ☒

If you checked yes, how is the client related to you?

The work of the Board of Directors requires consistent attendance at monthly meetings of the Board of Directors and Board committees. These meetings may take as long three to four hours, in the middle of the day, usually on Tuesdays. Will your schedule allow you to attend Board and committee meetings? Please explain.

Currently I'm not working or going to school. I have full availability. I have great attendance record to People First planning meetings.

Do you have experience as a member of a Board of Directors or any other governing body? Please explain.

Yes, I am currently the vice-president of Imperial Valley People First.

Which of the following skills do you have? (Check as many as apply)

DEVELOPMENTAL DISABILITY PROGRAM SKILLS ☒

LEGAL ☐ MANAGEMENT ☒ PUBLIC RELATIONS ☒ OTHER ☐

Please describe in more detail how your skills are related to developmental disabilities.

My skills are related to developmental disabilities because I myself have a mental disability and I've been able to work and be part of my community thanks to the programs that have been provided to me.

Why would you like to be a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center)?

With my experience, I can help others to be more independent like me and we can work together on new ideas for the people.

What is your ethnicity?

Hispanic.

By signing this application you certify that you are not employed by or a member of the governing body of any entity from which the San Diego Regional Center purchases services, and that you are not aware of any conflict of interest that would result from you being a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center).

Signature

Date

6-4-25



San Diego-Imperial Counties Developmental Services, Inc.
4355 Ruffin Road, San Diego, California 92123 · (858) 576-2996 · www.sdrc.org

Board of Directors Application

Name: R [REDACTED] M [REDACTED] M [REDACTED]

Home Address: [REDACTED]

Telephone Number: [REDACTED]

E-Mail Address: [REDACTED]

Employer: El Centro Elementary School District Occupation: Substitute Teacher

Describe how you have demonstrated an interest in or knowledge of developmental disabilities.

I have substituted special education classes in the past, and I socialize with other clients from the San Diego Regional Center since I became one back in 2017. I also feel that they are going to be vulnerable in the current landscape of our society, so I want to ensure they are able to live safer lives.

Describe in which area or areas of developmental disability you have experience (intellectual disability, cerebral palsy, epilepsy, autism, Early Start, other).

Throughout my years of substitute teaching, I have experienced autism, ADHD, Deafness, Near Sightedness, Intellectual Disability, Dyslexia, Down Syndrome, and Learning Disability. I also experienced having autism throughout my life and how it has affected my social skills, learning development, and work management.

Are you a client of the San Diego Regional Center? (Check one)

Yes ☒ No ☐

Do you have a family member who is a client of the San Diego Regional Center? (Check one)

Yes ☐ No ☒

If you checked yes, how is the client related to you?

The work of the Board of Directors requires consistent attendance at monthly meetings of the Board of Directors and Board committees. These meetings may take as long three to four hours, in the middle of the day, usually on Tuesdays. Will your schedule allow you to attend Board and committee meetings? Please explain.

It would depend if my summer job gives me no work days on Tuesdays. Otherwise, I am able to schedule a non-working day on a Tuesday through Frontline, so the school district won't notify me for an available job assignment on that day. This may be subject to change if I pass my edTPA get a career as a full-time teacher.

SDICDSI Board of Directors Application
Page 2 of 2

Do you have experience as a member of a Board of Directors or any other governing body? Please explain.

I only have experience in partaking at seminar meetings at school.

Which of the following skills do you have? (Check as many as apply)

DEVELOPMENTAL DISABILITY PROGRAM SKILLS ☐

LEGAL ☐ MANAGEMENT ☒ PUBLIC RELATIONS ☐ OTHER ☐

Please describe in more detail how your skills are related to developmental disabilities.

Why would you like to be a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center)?

Yes, I would like to be a member of the Board of Directors because I feel I could bring up unique scenarios on how to teach people with disabilities to think critically.

What is your ethnicity?

White Hispanic

By signing this application you certify that you are not employed by or a member of the governing body of any entity from which the San Diego Regional Center purchases services, and that you are not aware of any conflict of interest that would result from you being a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center).

Signature

06/09/25

Date



San Diego-Imperial Counties Developmental Services, Inc.

4355 Ruffin Road, San Diego, California 92123 · (858) 576-2996 · www.sdrc.org

Board of Directors Application

Name: [Redacted] V. R. [Redacted]

Home Address: [Redacted]

Telephone Number: [Redacted]

E-Mail Address: [Redacted]

Employer: self employed

Occupation:

Describe how you have demonstrated an interest in or knowledge of developmental disabilities

By Participating in various program in the Imperial Valley I am aware of the needs of individuals with developmental disabilities and I am always trying to advocate for other achievements and growth.

Describe in which area or areas of developmental disability you have experience (intellectual disability, cerebral palsy, epilepsy, autism, Early Start, other).

ARC, Adjoin and work Training center

Are you a client of the San Diego Regional Center? (Check one)

Yes ☒ No ☐

Do you have a family member who is a client of the San Diego Regional Center? (Check one)

Yes ☐ No ☒

If you checked yes, how is the client related to you?

The work of the Board of Directors requires consistent attendance at monthly meetings of the Board of Directors and Board committees. These meetings may take as long three to four hours, in the middle of the day, usually on Tuesdays. Will your schedule allow you to attend Board and committee meetings? Please explain.

My schedule is very flexible and program encourage me to be responsible with all of my activities.

Do you have experience as a member of a Board of Directors or any other governing body? Please explain.

No.

Which of the following skills do you have? (Check as many as apply)

DEVELOPMENTAL DISABILITY PROGRAM SKILLS ☒
LEGAL ☐ MANAGEMENT ☐ PUBLIC RELATIONS ☒ OTHER ☐

Please describe in more detail how your skills are related to developmental disabilities. I am a people person with abilities to communicate with other disabled individuals. Skills to coach, teach and encourage others to achieve their goals.

Why would you like to be a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center)?

To improve the lives of clients in our community, to promote transportation, opportunities of employment and learning in order to be more self sufficient.

What is your ethnicity?

Hispanic

By signing this application you certify that you are not employed by or a member of the governing body of any entity from which the San Diego Regional Center purchases services, and that you are not aware of any conflict of interest that would result from you being a member of the Board of Directors of the San Diego-Imperial Counties Developmental Services, Inc. (San Diego Regional Center).

Signature

Date

7/2/25



San Diego Regional Center
4355 Ruffin Road, San Diego, CA 92123
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Serving individuals with developmental disabilities in San Diego and Imperial Counties

July 30, 2025

To: Members, SDICDSI Client Advisory Committee

Kim Rucker
Elmo Dill
Mark Uyeda
Taylor Wiesner
Cali Williams

From: Erik Rascon, Chair

Re: August 12, 2025: Client Advisory Committee Meeting

There will be a meeting of the Client Advisory Committee held at **11:00am on Tuesday August 12, 2025 in Conference Room #300.**

Join Zoom Meeting

<https://sdrc-org.zoom.us/j/86153940094?pwd=DX04tdV1va96aOepF7nRF4h4pFJiaG.1>

Meeting ID: 861 5394 0094

Passcode: Lu3kMA

The proposed agenda is:

1. Call to Order
2. Approval of minutes
3. Introductions (in-person and zoom attendees)
4. Update on local self-Advocacy Groups:
 - a. St. Mad's
 - b. Imperial Valley
5. Update on San Diego People First Advocacy Group: Taylor and Cali
6. ARCA CAC update-Viri
7. Bullying/Harassment Training Development by CAC
8. Review Self-Determination Conference held on June 26, 2025
9. Review Board Packet

Please contact Robin Bello 858-924-0870 if you have any questions, or if you are unable to attend the meeting.

cc: David Hadacek, SDICDSI Chair
Mark Klaus, Executive Director



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Serving individuals with developmental disabilities in San Diego and Imperial Counties

CLIENT ADVISORY COMMITTEE (CAC) MINUTES

June 10, 2025

Members Present: Erik Rascon, Kim Rucker, Elmo Dill, Cali Williams, Taylor Wiesner.

Staff Present: Robin Bello

Community Participants: Debbie Marshall (SCDD), Jacob Smith (Imperial Valley-People First), Desiree Boykin (Participant), James Stolarek (Participant), Becky Williams (Parent).

Call to Order: Erik Rascon, CAC Chair, called the meeting to order at 11:07 am.

Approval of May 2025 minutes:

Update on local Self Advocacy groups:

- a. St. Madeleine Sophie's Center: Cali provided an update for St. Mad's. The St. Mad's Fashion Show is 2nd. There are a lot of events occurring for the summer. St. Mads art gallery was on PBS recently.
- b. Imperial Valley People's First: Jacob and Erik discussed a presentation on 'Bullying' and how to keep ourselves safe and shared personal experiences.

Update on San Diego People's First/Self-Advocacy: Taylor gave an update on San Diego People First. Conference will be in 2026 and they will be hosting a summer picnic in August, more information will be shared.

Other

- a. The CAC is going to create a presentation on Anti-Bullying during our next CAC meeting in August 12th. We'd like to share this presentation with SC and vendors.
- b. CAC discussed the possible budget cuts related to Medicaid.
- c. CAC talked about how important IHSS to us all and our families
- d. CAC talked about the housing issues and the cost of living

e. SDP conference is June 26th

Next meeting will be August 12, 2025.
Meeting adjourned at 11:55 am.

cc: Dave Hadacek, SDICDSI Chair
Mark Klaus

SDRC INTERNAL STAFF TRAINING: June-July 2025

DATE/TIME	TRAINING	LOCATION	AUDIENCE	ATTENDED
6/2/2025- 6/12/2025 8:00am-4:30pm daily	Foundations for Success – new hire training	Suite 118 with Training Team	SDRC New Hires	32
6/10/2025	Justice, Liberty and Belonging Session 1 & 2	Imperial Valley	SDRC staff	20
6/10/2025 – 6/12/2025	Justice, Liberty and Belonging Session 2	SDRC Training Rooms	SDRC staff	20 per session – total 60
6/17/2025	Justice, Liberty and Belonging Session 2	Suite 118 Training Room	SDRC Staff	20 per session – 40 total
7/21/2025- 7/31/2025	Foundations for Success – new hire training	Suite 118 with Training Team	SDRC New Hires	29
7/23/2025, 7/29/2025 and 7/30/2025	Time Study Training	Zoom with Andi Hogan	Client Services and Intake Staff	N/A
7/30/2025	Generational Communication	Joya Kitchen	SDRC Managers	105

SDRC COMMUNITY TRAINING – SCHEDULED FOR MAY 2025

DATE/TIME	EVENT NAME	EVENT LOCATION	AUDIENCE	ATTENDED
6/30/2025	FAADD Presentation on IPP	Boardroom, Ruffin Road	FAADD Membership, vendors, families, individuals. SDRC staff	30

SDRC OUTREACH LACC: June 2025 – July 2025

DATE/TIME	EVENT NAME	EVENT LOCATION	AUDIENCE	ATTENDED
6/4/2025 1:00pm-5:00pm	Early Learners Resource Fair	2375 Congress Street, San Diego	Families with young children	120
6/7/2025 12:00pm-6:00pm	Pride by the Beach	Pier View Way, Oceanside	Open to community	200
6/14/2025 11:00am-3:00pm	Day at the Park	Bayfront Park, Chula Vista	Open to community	500+
6/21/2025 10:00am-4:30pm	Juneteenth Celebration	Pier View Way, Oceanside	Black/African American Families	145
6/21/2025 10:00am-2:00pm	ECS/Para las Familias Back to School Fair	Montgomery Waller Park, San Diego	Families	300+
7/13/2025 11:30am-3:30pm	Padres Game	Petco Park	Open to community	250+
7/19/2025 - 12:00-10:00pm 7/20/2025- 12:00-9:00pm	San Diego Pride	Hillcrest/Balboa Park	Open to community	400

TRIBAL OUTREACH: June 2025-July 2025

DATE/TIME	EVENT NAME	EVENT LOCATION	AUDIENCE	ATTENDED
6/17/2025 10:00am-2:00pm	Viejas Wellness Center	Yaytaanak Wellness Center, Alpine	Tribal – all ages	30
7/12/2025	Traditional Health Gathering: Wellness Rising	Pala Rey Youth Camp, Pala	NA families	100

CHILD FIND PART C SAN DIEGO: June 2025 – July 2025

DATE/TIME	EVENT NAME	EVENT LOCATION	AUDIENCE	ATTENDED
6/27/2025 1:00pm-4:00pm	EFMP Summer Event	MCAS Miramar	Military Families	100
7/8/2025 9:00am-12:00pm	Birthline SD	9915 Businesspark Ave. San Diego	Families with babies	3
7/11/2025 11:00am-2:00pm	All Inclusive Day of Play & Resource Fair	10440 Black Mountain Rd., San Diego	Open to community	1000
7/14/2025 9:00am-12:00pm	EHS Orientation	310 3 rd Avenue, Chula Vista	Families with young children	30
7/21/2025 1:30pm-6:00pm	Loma Verde Elementary Back to School Night	Loma Lane, Chula Vista	Loma Verde school families	400
7/25/2025 10:00am-12:00pm	Early Head Start Socialization Group	310 3 rd Avenue, Chula Vista	Families with babies	25

CHILD FIND PART C IMPERIAL VALLEY: June 2025-July 2025

DATE/TIME	EVENT NAME	EVENT LOCATION	AUDIENCE	ATTENDED
7/9/2025 1:00pm-3:00pm	Outreach at Family Resource Center	1014 Brighton Ave, El Centro	Families	Drop in
7/23/2025 1:00pm-3:00pm	Outreach at Family Resource Center	1014 Brighton Ave, El Centro	Families	Drop in

OTHER EVENTS/PRESENTATIONS: June 2025- July 2025

DATE/TIME	EVENT NAME	EVENT LOCATION	AUDIENCE	ATTENDED
6/26/2025 8:00am – 4:15pm	3 rd Annual Self Determination Conference	DoubleTree by Hilton Hotel San Diego – Mission Valley	SDP clients, families, service providers/coordinators	250
6/26/2025 8:00am-12:00pm	Ventanilla de Salud	Mexican Consulate, San Diego	Families visiting the consulate office	
6/28/2025 8:00am-12:00pm	Mobile Consulate MAAC, Vista	956 Vale Terrace Dr, Vista CA 92084	Families visiting the consulate	