



## **Learn How to Turn Your Budget into a Spending Plan**

Webinar | May 20, 2021

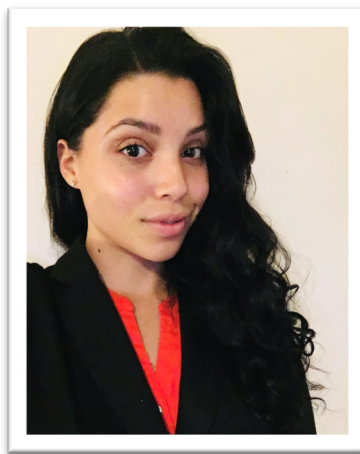


# Introductions

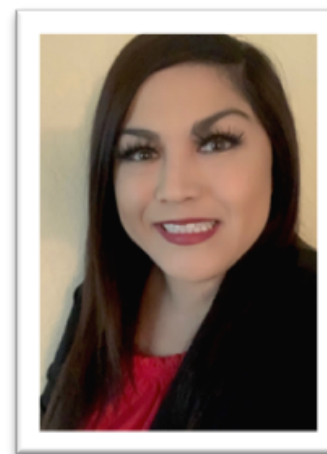
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**Tiffany Lang**  
Director of Business Development  
GT Independence



**Damaris Ruiz**  
Field Service Representative  
GT Independence



**Nicole De Guzman**  
Field Service Representative  
GT Independence



## The GT Independence Story

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Founded in 2004, GT Independence was created out of the basic instinct of a parent trying to provide the very best options for their child.



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# The Benefits of Self-Determination



## The Freedom of Self-Determination

The Self-Determination Program empowers individuals to have more control in developing their service plans and selecting service providers to better meet their needs.





# The Benefits of Self-Determination

- We know that with choice there are **better outcomes**.
- People participating in Self-Determination programs report a **higher quality of life** than people participating in traditional care.
- Self-Determination can significantly **reduce your unmet needs**, or those of your loved ones.
- **You are the experts** when it comes to your own lives and needs, or those of your loved ones.
- Self-Determination can **reduce your costs and increase flexibility**. One study showed a cost savings of 12.4% to 15.5%.
- We are currently experiencing a shortage of caregivers. Self-Determination **brings caregivers into the workplace** who may not otherwise have chosen that career path.

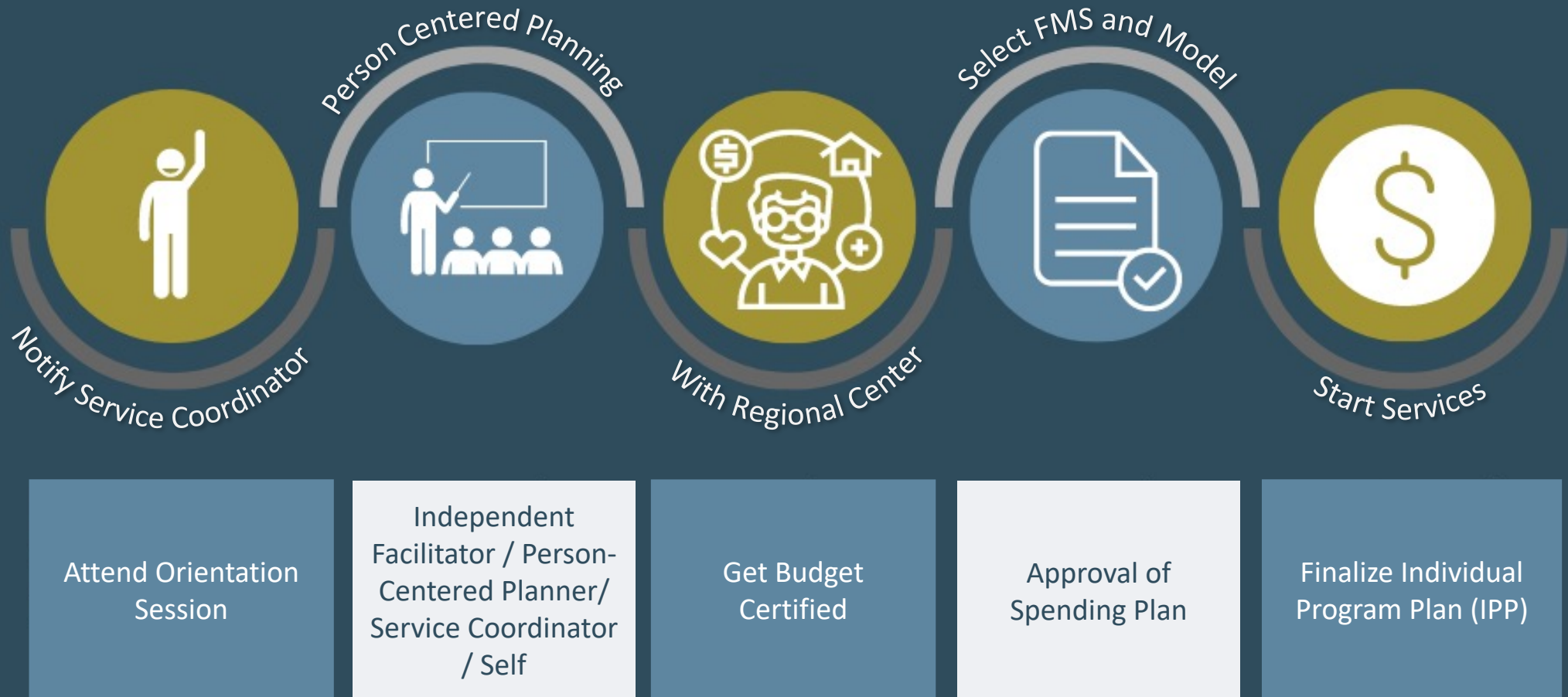


## Self-Determination: A New Option for Californians

- Currently in rollout phase with **7,500+ individuals on the waitlist**
- Approximately **556 out of 2,500 soft roll-out slots are filled**
- Program **opens statewide in June 2021**



# Self-Determination: The Steps to Get Started



# Steps to Complete First

- **Notify the Service Coordinator** from your local Regional Center that you are interested in Self-Determination
- **Sign up and attend orientation** meeting with the Regional Center
  - *Note: Not all Regional Centers are offering full orientation at this time for those who are not participating in the soft roll out*





# How Do You Get a Certified Budget?



# What Is a Certified Budget?

## **The Total \$ Amount You Can Spend**

*For the next 12 months*

**To get started, request a copy of your 12 Month Statement  
or Expenditure Report**

*Note: Your Regional Center may have a different name*



# Get Your Budget Certified

## **What to expect during a budget meeting:**

- Discussion with Regional Center to determine how much was spent on services in the last 12 months – this will be the starting budget amount for the SDP program
- Discussion with Regional Center about what services are currently needed

## **Reasons the budget can be changed:**

### Unmet needs

- Needed services in an IPP were not used or there were needs not addressed in the IPP

### Any change in circumstances

- Life has changed and so have the needs of the individual

If the amount is less than the allocation for the previous 12 months, reasons could be:

- Illness
- Services started or ended within the past 12 months
- Provider not available
- Waiting for provider to have an open slot or staffing available

If an individual has less than 12 months of services, the team will determine if funds can be added to your budget

- The amount added will be the average cost for services under the traditional service system



## Tips to Help the Budget Process Run Smoother

- Come to the budget meeting with a **clear set of goals** you hope to accomplish over the next 12 months
  - A Person-Centered Plan is the best way to do this
  - For those who do not have a formal Person-Centered Plan, putting the same thought into this ahead of time is very beneficial
- **Come Prepared**
  - Request a **copy of the expenditure report** as well as a **blank budget calculation tool** prior to the meeting
  - Understand **what can and cannot be purchased** in Self-Determination
  - Review **service definitions for the waiver**
  - Understand **when money can and cannot be added** for certain services/support
  - Be prepared to **explain why a generic resource is inappropriate** for your needs

## Tips to Help the Budget Process Run Smoother

- **Come in partnership:** everyone is there to help you accomplish your goals
- **Understand your rights:** if you disagree with a decision made by the Regional Center, you can appeal to a Fair Hearing
- **Ask questions** if you don't understand something or need more information
- Have your **circle of support** present



# Choosing Your FMS Model

## Bill Payer

- You hire the FMS to pay the agency you select to provide services
- You do not hire staff directly

## Co-Employer

- You hire the FMS to be the employer on your behalf
- FMS has authority over who you select as your service provider
- FMS manages the insurance and liability
- Administrative costs are added to every dollar spent from your budget

## Sole Employer

- You are the employer; the FMS is hired to be your agent
- FMS provides ongoing support and manages details, such as payroll, tax filings and insurance
- Offers the most control and access to dollars in the budget

# What is a **Spending Plan**?

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**Answer:**

**How you will spend the money.**

# Building the Spending Plan

*Participant, FMS*

## Requirements for Spending Plan

- Must be an approved service
- Must support choice and inclusion
- Can be vendored or non-vendored

## Developing a Spending Plan

- Support: Includes family and friends, Service Coordinators, IF and FMS
- Identify: Services need which are identified on the PCP and documented on the IPP
- Determine: Generic Services an identify them
- Determine: What? How Often? Length of time? Cost?

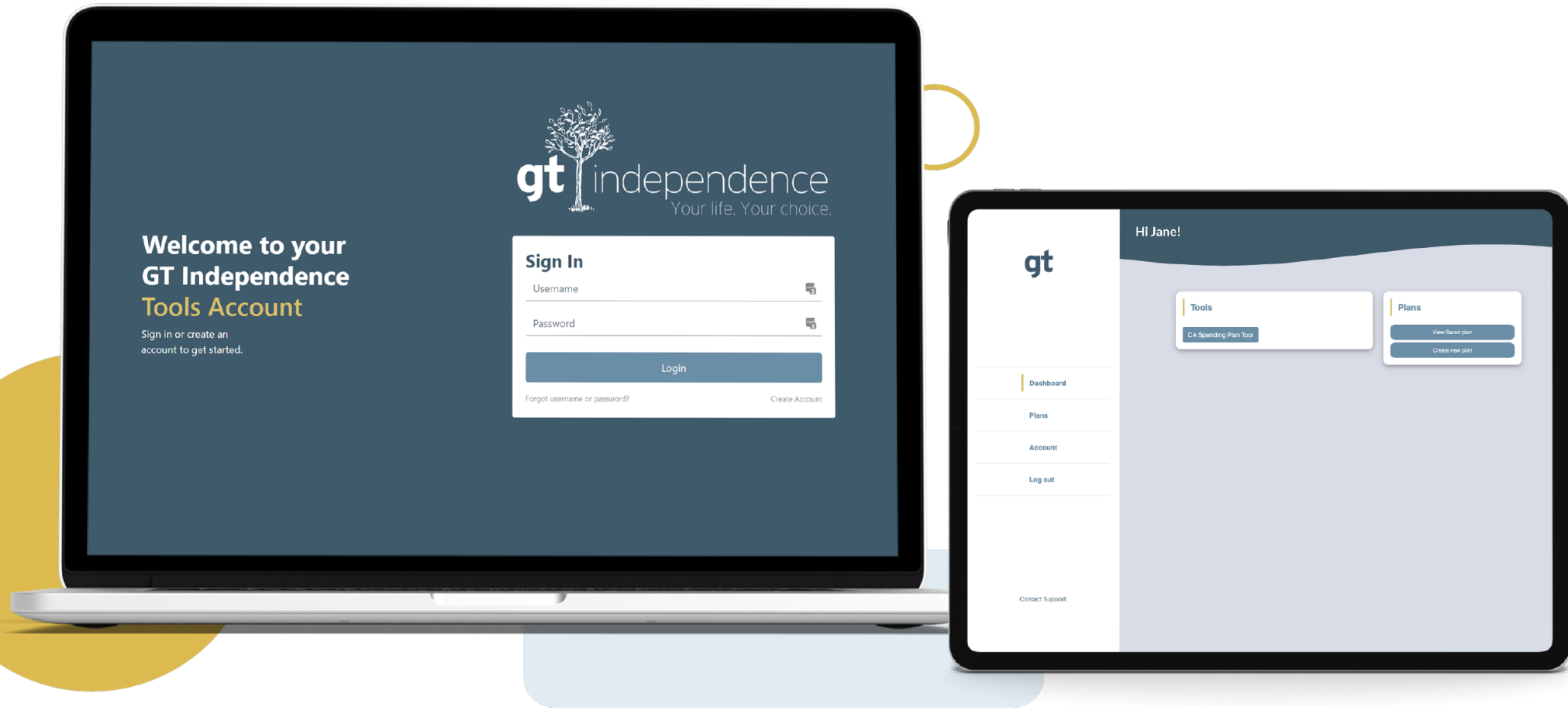
## Identify 3 Budget Categories for Goals

- Living arrangements: Supports in home
- Employment & community participation: Supports in community
- Health & safety: Services to help keep you healthy and safe



# Using the **Spending Plan Generator**

# gt Spending Plan Decisions and How Your FMS Can Help



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Q&A



# Resources

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- The Self-Determination Interchange: <https://disabilityvoicesunited.org/interchange/self-determination>
- SDP Connect weekly Zoom session: <https://disabilityvoicesunited.org/interchange/self-determination/sdp-connect/>
- California Self-Determination Program Forum Facebook page: <https://www.facebook.com/groups/CA.SDP.Forum>



# Regional Center SDP Contacts

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**Central Valley Regional Center:** Elisa Escareno, [EEscareno@cvrc.org](mailto:EEscareno@cvrc.org)

**Eastern Los Angeles Regional Center:** Roxana Ortiz, [ROrtiz@elarc.org](mailto:ROrtiz@elarc.org);  
Elizabeth Ornelas, [EOrnelas@elarc.org](mailto:EOrnelas@elarc.org)

**Golden Gate Regional Center:** Juliet Sousa, [JSousa@ggrc.org](mailto:JSousa@ggrc.org)

**Harbor Regional Center:** [SelfDetermination@harborrc.org](mailto:SelfDetermination@harborrc.org)

**Inland Regional Center:** [SelfDetermination@inlandrc.org](mailto:SelfDetermination@inlandrc.org)

**Lanternman Regional Center:** [SelfDetermination@Lanternman.org](mailto:SelfDetermination@Lanternman.org)

**North Bay Regional Center:** Beth DeWitt, [BethD@nbrc.net](mailto:BethD@nbrc.net)

**Northern Los Angeles Regional Center:** Silvia Renteria-Haro, [SHaro@nlarc.org](mailto:SHaro@nlarc.org)

**Regional Center of East Bay:** Jessica Castaneda, [JCastaneda@rceb.org](mailto:JCastaneda@rceb.org)

**Regional Center of Orange County:** [SelfDetermination@rcocdd.com](mailto:SelfDetermination@rcocdd.com)

**San Andreas Regional Center:** [SelfDetermination@sarc.org](mailto:SelfDetermination@sarc.org)

**San Diego Regional Center:** [SDP@sdrc.org](mailto:SDP@sdrc.org)

**San Gabriel/Pomona Regional Center:** Hortecia Tafoya, [HTafoya@sgprc.org](mailto:HTafoya@sgprc.org)

**South Central Los Angeles Regional Center:** Naomi Hagel, M.S., [NaomiH@sclarc.org](mailto:NaomiH@sclarc.org)

**Westside Regional Center:** Cesar Garcia, [CesarG@westsiderc.org](mailto:CesarG@westsiderc.org)

Check your Regional Center's website for email addresses



# Let Our Experts Help

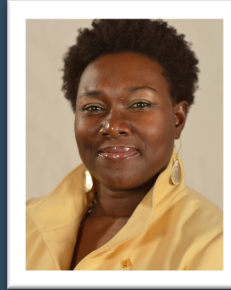
Contact one of our GT Independence representatives and they will walk you through every step of the process. This includes identifying your local regional center and preparing you for your first meeting. Spanish speaking representatives are available.

## Visit us

[gtindependence.com/ca](https://gtindependence.com/ca)

## Follow us

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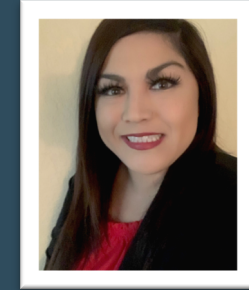
### **Terrasel Jones**

Director of State Services  
Phone: 1.213.200.3641  
Office: 1.877.659.4500  
[tjones@gtindependence.com](mailto:tjones@gtindependence.com)



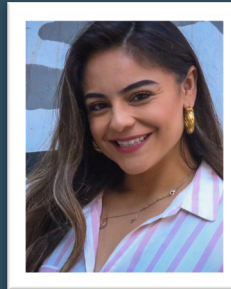
### **Tamara Flaherty**

Field Service Representative  
Northern California  
Phone: 1.415.792.3955  
Office: 1.877.659.4500  
[tflaherty@gtindependence.com](mailto:tflaherty@gtindependence.com)



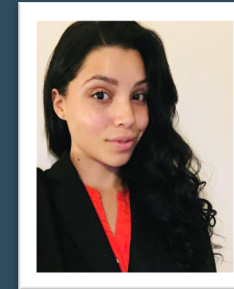
### **Nicole De Guzman**

Field Service Representative  
Northern California  
Phone: 1.559.470.7309  
Office: 1.877.659.4500  
[ndeguzman@gtindependence.com](mailto:ndeguzman@gtindependence.com)



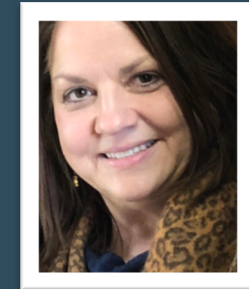
### **Jessica Mercado**

Field Service Representative  
Northern California  
Phone: 1.916.223.0061  
Office: 1.877.659.4500  
[jmercado@gtindependence.com](mailto:jmercado@gtindependence.com)



### **Damaris Ruiz**

Field Service Representative  
Southern California  
Phone: 1.818.224.0456  
Office: 1.877.659.4500  
[dr Ruiz@gtindependence.com](mailto:dr Ruiz@gtindependence.com)



### **Pamela Abbondanza**

Field Service Representative  
Southern California  
Phone: 1.619.340.3925  
Office: 1.877.659.4500  
[pabbondanza@gtindependence.com](mailto:pabbondanza@gtindependence.com)



# Call to Action

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- ✓ Talk to your Regional Center to get the process started
- ✓ Visit your Regional Center's Self-Determination webpage
- ✓ Get involved with your local Self-Determination Advisory Committee
- ✓ Reach out to GT Independence representatives with any questions



## Before You Go

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- You'll receive a post-webinar survey – please share any questions or feedback with us!
- You will also be emailed a recording of today's webinar
- Follow us on social media for news and updates about upcoming webinars:
  - Facebook: [@californiagt](#)
  - Twitter: [@gt\\_California](#)
- We hope we have the opportunity to serve as your FMS!

Want to stay updated on webinars, resources, and news about self-determination in California?

**Sign Me Up**



**Thank You**