

BAY AREA PROJECT

COMMUNITY DEVELOPMENT PLANNING TEAM

FINAL REPORT

OCTOBER 2003

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1. **COMMUNITY DEVELOPMENT TEAM MEMBERSHIP**

The Community Development (CD) Team is comprised of a total of 35 members representing a variety of agencies and organizations currently providing services to consumers served through Golden Gate Regional Center (GGRC), Regional Center of the East Bay (RCEB), and San Andreas Regional Center (SARC). Membership includes consumers and parents (both from Agnews Developmental Center [Agnews] and the community), parent organizations, Area Boards V and VII, advocacy groups, service providers, legislative office representatives, regional centers (GGRC, RCEB and SARC), Department of Developmental Services (Department), and Agnews Developmental Center (Agnews) staff. In addition to these 35 members, the CD Team initiated four workgroups from which the recommendations and implementation plans were developed.

As a beginning phase, each of the four workgroups established their membership based upon identified interest, expertise and geographic location to assure representation from all three regional center catchment areas. Membership continued to grow throughout the process as each workgroup recognized the need for expertise and/or as people expressed a desire to participate. Representation on each workgroup was designed to facilitate the greatest resources based upon the task assigned to that group. Additional membership was sought when needed via personal contacts, newsletters, and word of mouth. Within these four workgroups there are 65 members, some of whom are on more than one committee or workgroup. Overall the cross representation on these workgroups is identical to the CD Team with some additional expertise drawn in when necessary to accomplish the assigned task.

(Refer to Attachment 1A – 1G for the list of members involved on each committee/workgroup.)

2. **COMMUNITY DEVELOPMENT TEAM CHARGE**

Coordinate the development of services and supports that will be responsive to the needs of Agnews' residents transitioning to community services.

3. **COMMUNITY DEVELOPMENT TEAM PROCESS**

The CD Team held their first meeting in March of 2003. The initial meeting was established as an opportunity for each member to meet the entire composition of the team, to learn more about the charge assigned to the committee by the Department, and to select additional membership on one or more of the four workgroups that had been established. Additionally at this first meeting, the team established the "ground rules" for their operations and reviewed the timelines

established for completing all of the work required. On a monthly basis thereafter the CD Team met to provide an update to all members regarding the ongoing activities, working recommendations, and ideas from each workgroup. These meetings also afforded CD Team members, who were not part of the four workgroups, the opportunity to ask questions, clarify issues, and identify any recommendations for the workgroups to consider.

The four workgroups that were established as part of the CD Team to compile the summary of recommendations, barriers and implementation plans, were: (1) Housing; (2) Service Hubs; (3) Support Services; and (4) Quality Assurance.

The starting point for each workgroup was to review the charge established by the CD Team, and to determine the values and guiding principles that would support this charge. These values and guiding principles allowed each workgroup to remain focused on the important aspects of their task and in the end to measure their final recommendations to those principles established.

The second phase for the four workgroups was to develop a work plan that outlined each of the necessary tasks required to formulate the recommendations that would meet the needs of the people served at Agnews and the community at large. Each of the work plans had an emphasis on gathering written information, identifying and meeting with “experts” within their respective areas, and meeting with consumers and parents/family members who could offer their personal insight into past and current services received. Each of these steps offered the workgroups additional information in what has worked in the past, what was needed in the future, and what the preferred options were for living, working, and prospering in the community.

The final phase in the process was the development of recommendations and implementation plans. This process began by reviewing demographic information regarding the persons who reside at Agnews from the Futures Planning process. Information regarding specific service needs and strengths, as well as their preferences and priorities, established the foundation for this plan. Once a preliminary plan was drafted, the plan was discussed with the other CD workgroups to assure that the final plan and recommendations were integrated into one comprehensive plan.

(Refer to Attachments 2 and 3 for the list of resources and experts utilized to formulate these recommendations.)

4. **GUIDING PRINCIPLES**

The CD Team began this process with the foundation of the Bay Area Project's three guiding principles. These principles are as follows:

(1) Build quality into every option from the beginning; (2) Do it right the first time; and (3) Pay for it once.

As each workgroup formed their guiding principles, a more inclusive set of principles were formulated as the driving force behind the CD Team. These principles have assisted the CD Team, and each workgroup, in maintaining a focus on the men and women served at Agnews and the specific needs of this group of people. They are as follows:

a. **Start With The Person**

We will assure that each step of this process begins, continues and ends with each person in mind. We commit to ensuring that whenever and wherever possible the development of services and supports will be based upon the needs, preferences and priorities of each consumer, and when appropriate, family members and/or circle of support, to guarantee a successful transition into community living.

b. **Do It Right The First Time**

We will plan and develop a range of options keeping in mind "one person at a time." Each person's interdisciplinary team (IDT) will review a range of options to assure that the option selected is consistent with the person's needs, preferences, and priorities. We will assure that our commitment to people living at Agnews will focus on expanding resource and provider ability, accessibility, and availability to assure necessary services are accessible.

c. **Build A Sense Of Community**

Building a sense of community supports a commitment to each individual, family member, and person involved of the importance of established relationships and partnerships. This commitment assists us in defining who we are today and who we hope to be in the future. It allows us to become an active part of our new community while maintaining those connections we have already established, based upon a shared sense of vision and direction. In building the community we commit to continued services that do not compete with other supports and services but allows us to become partners with existing resources.

d. **Build Quality Into Every Option From The Beginning And Thereafter**

We've made a promise to the people that we serve. We will keep that promise today and tomorrow. The future that we develop will be individualized, comprehensive, and reliable. We commit to identifying "excellence" in all we do that promotes state-of-the-art services and best practices throughout the developmental service system. We will create a systemwide culture of continuous quality improvement based upon partnerships and mutual supports that assures accountability for the system at all levels of the service delivery system. The State will be an active and ongoing partner in making it happen.

e. **Pay For It Once**

A goal of the Bay Area Project is to develop a stable range of services that are responsive to the needs of the people who live at Agnews, and that will be an ongoing resource to Californians who require developmental services. We will find ways to establish secure settings that are dedicated to developmental services and we support use of universal design concepts that meet the needs of the individuals and staff to assure living options for life.

f. **Provide A Safety Net of Services and Supports**

Our commitment is to provide a range of services and supports as a safety net for those individuals whose needs exceed the capacity of established resources. In doing so we commit to focusing on expanding resources and provider ability, accessibility, and availability.

g. **Become A Regional Resource**

The developmental service system is a part of the larger community. Our values and the law require us to form partnerships with the full range of resources that impact California citizens. We commit to joining with the established service system and regional centers in exploring ways to form and strengthen those working relationships.

h. **Design A Stable Service System**

An important aspect in assuring a permanent and stable service delivery system will be the need to separate the ownership of the housing from the group or individuals that will be providing the support and/or services to

the consumer. This assures stability of ownership, commitment to keeping people in their homes 'for life' and also allows for the necessary changes or adjustments to service and supports based upon consumer need.

i. **Develop Fiscally Responsive And Cost Effective Services And Supports**

The commitment in any and all service designs will be to assure that the end result will be one that is fiscally responsive and cost effective. One mechanism to assure this commitment will be to maximize federal participation in all aspects of the service delivery system. We will not design any service or support that does not make sense for the consumer and for the dollars expended.

5. **OVERVIEW**

Agnews has been an integral part of the Bay Area developmental service system for the past 40 years. The re-engineering of this service system should result in a future that makes sense for the persons who reside at Agnews, their families, the staff who serve them, and the community that they will live, work and play in.

The overall system design within the four workgroups was developed based upon the premise that people from Agnews would have the opportunity to move into the community, near family members. For a greater percentage of consumers this would be within the greater Bay Area based upon family location. Additionally, the emphasis of design was to ensure that the developmental services system in the Bay Area was strengthened and enhanced as a result of the Bay Area Project. This emphasis is to assure consumers leaving Agnews would continue to have the quality, stability, and support needed to make this transition successful.

Each of the four workgroups within the CD Team has submitted reports that identify a number of items for consideration. Overall emphasis in each of the workgroups is as follows:

a. **Housing**

Identifying the options for building homes and living arrangements that make sense for people at Agnews, keeping in mind the importance of each individual's needs and unique and innovative concepts. This includes elements such as Appropriate Housing Components; Cost of Housing Types; Descriptions of the Housing Types; and Financing

Strategies. A primary focus and emphasis includes the importance of assuring the permanence of these living arrangements to ensure they are available 'for life.'

b. **Service Hubs**

Designing services for consumers to continue to receive all of the necessary support and services required to maintain their health and well being, as well as a system design to serve people currently residing in the community. In addition, the Service Hub design focuses on support services to providers and vendors as a mechanism for improving the overall quality of services provided and increasing the strength in the service delivery model.

c. **Support Services**

Designing a list of services that would be required to facilitate a successful transition into community life. This list encompasses Day Services and Supports; Recreation and Leisure Services and Supports; Living Options Services and Supports; Auxiliary Supports and Services; and Transition Services and Supports.

d. **Quality Assurance**

Designing a Quality Assurance (QA) system that will ensure the people leaving Agnews continue to receive the quality of services and supports needed to be successful. The design of this system expands the overall monitoring of services to people in the community and increases the emphasis on outcomes and satisfaction as well as the day-to-day service monitoring. Additionally, it is based upon the conceptual model that balances compliance monitoring and quality of life outcomes utilizing the overall framework of the Centers for Medicare & Medicaid Services (CMS)-Home and Community-Based Services Waiver (HCBS) Quality Improvement (QI) framework.

6. **COMMON THEMES**

There were a number of common themes, or recommendations, identified throughout each of the workgroups. These themes identified that the Bay Area Project must assure:

- a. Focus on the individual and the importance of developing services and supports that respond to the individual first, rather than attempting to fit an individual into an existing resource that may be unsuited to his or her needs.

- b. Focus the development of services that “bring” supports to the consumer rather than requiring the consumer to travel to the supports to promote stability of the person in his/her home.
- c. All efforts in designing new services, systems and supports must be directed at integrating with already existing community supports.
- d. Services that will be located close to families and in areas that assure access to community resources.
- e. Development will not be constrained by established models; innovation, and best practice will be supported.
- f. A range of staff development, training, and mentoring processes will be made available to support quality improvement in the Bay Area.
- g. A full range of services will be made available to assure that the choice of services other than state institutions is not restricted based on the service needs of the person.
- h. Supports will be available to promote stability of the person in his/her home.

7. **HOUSING DEVELOPMENT**

We have the creativity, passion, technology and expertise to create new models of permanent, affordable housing that is fully equipped to support the medical and social needs of people with developmental disabilities that are currently residing at Agnews. These new models are beautiful homes integrated into the community where persons with developmental disabilities can be safe, build relationships, and thrive. We are committed to providing the best housing possible for persons leaving Agnews: all we need are community partners, collaboration, political support, and a dedicated stream of funding to make it happen. We also recognize that housing is only part of the equation for a person to successfully live in the community. Outstanding supportive staff and services are also needed to make it work.

The Housing Development Workgroup for the Bay Area Project was comprised of parents, consumers, people with expertise working with people with developmental disabilities, and people with expertise in housing and development. *(Please refer to Attachment 1C for a roster of participants.)* The Housing Development Workgroup has met over six months to address three key housing questions: (1) What types of housing are appropriate for persons with developmental disabilities? (2) What is the cost of these models? and (3) What are potential financing strategies? We believe we have successfully answered

these three questions based on our expertise, and by enlisting a diverse group of consultants to provide additional insight and analysis to these questions.

a. **Summary of Conclusions from Community Meetings and Consultant's Reports**

The total housing cost will be based on the number of Agnews ' residents to be moved into the community and the cost of the housing models that best fit their needs.

- (1.) The process of evaluating each individual's housing needs will include the Individual Program Plan (IPP) and a housing assessment survey created for this purpose.
- (2.) The range of housing types described in this report cost between \$73 million and \$120 million to build in the San Francisco Bay Area. The total average cost for the 11 counties included in this region would be approximately \$95 million, not including operations and services expenses.
- (3.) A dedicated source of funding is needed to duplicate successful housing models for persons with enduring medical needs and to create a continuum of housing types for persons leaving Agnews.
- (4.) It is recommended that non-profit agencies own the housing and separate non-profit agencies deliver the services.

b. **The Following Recommendations Refer to the Three Key Questions Addressed By the Housing Development Workgroup.** Based on a set of guiding principles, the following recommendations are considered critical components to house persons with developmental disabilities to live successfully in the community.

- (1.) **Appropriate Housing Components:** These include housing that fosters community building; that is customized for the individual; that separates the ownership of housing and services; that clusters a small number of developmentally disabled persons in a given area; that is located near service hubs; and that incorporates particular design features.
- (2.) **Community Building:** It is vital to create a sense of community that will support the individual residents and his/her staff as they transition from Agnews. Housing should be developed where a sense of community is consciously created among the residents, the service staff, neighbors, and community service agencies.

- (3.) **Customized to Fit Individuals' Needs:** It is important to develop a spectrum of housing models to accommodate the specific needs and desires of each individual. Several housing design templates will be created so individuals living at Agnews and their family members can see the options available to them. The IPP and housing needs assessment will guide the process of matching individuals with appropriate housing types and also influence the individual's choice of housemates. Unless it is the individual's preference to share a bedroom, all housing options will offer private bedrooms.
- (4.) **Separate Ownership of Housing and Delivery of Services:** It is imperative to create housing opportunities that separate the ownership of the housing from service delivery. This ensures that service delivery is un-interrupted in the event that an individual wants to change their housing location. Also, by encouraging non-profit ownership, the housing stock remains in the public domain to serve the developmentally disabled population and exists beyond the lifetime of the individuals served.
- (5.) **Small Number of Units Clustered Together:** In the interest of safety, security, and quality of service delivery, it is preferable to limit the number of developmentally disabled residents living within a property to be no more than 10 percent of the total tenant population. Small clusters of up to 15 developmentally disabled persons in a housing complex may be ideal for socialization and integration into the community. In addition, within individual housing units, no more than 5 persons with developmental disabilities will live together and preferably, only 3-4 developmentally disabled persons will be housemates. Some consumers may choose to share their lives in a variety of configurations including shared housing, shared common space as in the Casita/Cottage models, as well as co-housing models.
- (6.) **Located Near Service Hubs and Community Services:** Persons with medical needs require housing that is located near service hubs. In addition, the housing should be located in close proximity to police and fire departments, medical facilities, non-profit community services, affordable transportation, parks and recreational settings, educational institutions, and shopping centers.

- (7.) One of the concerns about community placement is having a facility for developmentally disabled persons who are in crisis and require extra support and medical treatment. Building an “Intervention Home” within the service hub staffed with employees who could provide crisis intervention or support services will offer extra support for short periods of time.

c. **Design Features**

Persons with developmental disabilities will thrive in the community if the housing is developed with thoughtful consideration of their accommodation and service needs. To support the Agnews Closure Plan, enough quality housing needs to be developed and made available through purchase, remodeling, or new construction in the Bay Area. A range of housing types should be available to provide options in living arrangements and service delivery models to accommodate the needs of the residents.

Models of economic, energy efficient, customized housing for this population exist throughout the country and in the Bay Area. Design templates based on these models and new, future models, will guide future development of housing for the Agnews’ residents.

Properties will be obtained in the Bay Area in neighborhoods that have the necessary support and provide meaningful opportunities for residents to participate in the community. This housing must be of good quality and guarantee the individual a safe and healthy place to live for as long as they choose to stay.

All housing options will be desirable and attractive places to live. Homes will have no more than four consumers and each person will have a private bedroom. They will be of good quality; designed with good spaces, light and constructed for longevity, durability, and a reasonable life cycle.

The homes must meet the requirements of the consumers that choose them and also accommodate their support staff as necessary. The physical environment plays a central role in shifting away from obstacles and restrictions toward choice, control and participation. Consumers' needs and preferences will be determined through a person-centered physical environmental assessment in the IPP. This assessment will be more specific and concrete than has been typical in IPP processes.

This housing stock must provide a continuum of models to suit the variety of capabilities and service needs of persons with developmental disabilities. It must present an array of affordable, customized, desirable options. Some of the critical design components include, but are not limited to, the following: Universal design standards that accommodate persons in wheelchairs; adequate space for leisure activities, exercise, and conveyance equipment; built with environmentally friendly materials in consideration for the residents' medical conditions; energy efficient and economical to maintain; fully equipped and customized bathroom facilities; ample parking for residents/family and their service staff; provide a private meeting space for confidential discussions; accessible outdoor space such as a yard, garden or patio; sufficient insulation for sound-proofing between rooms and floors; and ample storage room for medical equipment.

Special attention will be given to choosing "green" building materials in consideration for medical conditions of the residents and cost-effectiveness over time. Depending on their lifestyle and overall health, persons with disabilities may have increased health risks from chemicals commonly found in building materials and interior finishes. The residents will benefit from design strategies and interior finish materials that improve the quality of their home environment. In addition to minimizing use of materials that may offgas harmful chemicals, the project should strive to maximize fresh air flow and natural day lighting. By bringing the outdoors into their homes to the extent feasible, residents will likely realize significant health benefits as well as an overall improved outlook on life and sense of happiness.

The green building approach to affordable housing is gaining momentum and recognition within the government sector and development community. A few of the primary justifications and benefits to the developer include:

- (1.) Long-term ownership and interest justifies investment in creating a quality project;
- (2.) Investments in energy efficiency will reduce ongoing utility costs;
- (3.) Tax credits, utility incentives, financial and technical support available from local, state and federal agencies; and
- (4.) The recognition, sense of achievement and value in creating an innovative project which preserves natural resources and enhances quality of life for persons with disabilities.

Homes that satisfy these basic requirements will serve not only Agnews' consumers but also others in the community who would benefit from homes with these features. This housing stock becomes a valuable public resource and its construction is therefore good public policy.

d. **Cost of Housing Types**

The total housing cost cannot be determined until the housing needs assessment of each person living at Agnews has been completed. However, for this analysis, it is assumed that approximately 160 consumers will have enduring medical needs at the time the center is closed in 2005 and that 220 consumers will be satisfied with one of the following five housing types:

- (1.) Life Services Alternatives (LSA) Housing;
- (2.) Duplexes (new construction and remodels);
- (3.) Single Family Homes (new construction and remodels);
- (4.) Casitas/Cottages;
- (5.) Apartment Units.

e. **Summary of Development Costs by Housing Type**

Housing Type	Consumers		Cost/Consumer		
	#	%	Santa Clara	Alameda	SF
Life Services Alternatives	160	42%	\$249,512	\$206,113	\$343,028
Duplex—New Construction	80	21%	\$231,868	\$173,674	\$316,231
Duplex – Remodel	15	4%	\$244,879	\$190,462	\$282,272
Single Family Homes—New	10	3%	\$208,077	\$150,766	\$348,005
Single Family Home—Remodel	10	3%	\$277,003	\$189,355	\$307,596
Casita/Cottages	25	6%	\$228,851	\$159,853	\$403,009
Apartment Units	80	21%	\$228,362	\$180,907	\$240,880
Total	380	100%	\$90,985,656	\$72,415,277	\$119,757,813
Source: BAE, 2003					

f. **Descriptions of the Housing Types**

(1.) **LSA Housing**

This type of housing provides a community housing option for the medically fragile. Typically accommodating no more than 5 residents per building, the LSA model is meant to be a home with all the amenities and feel like a traditional single-family residence rather than a skilled nursing or intermediate care facility. Building upon the experience of the Rivermark LSA project and taking into consideration the land value and development cost variations between the 11 counties in the San Francisco Bay Area, the LSA model could range in cost between \$206,113 and \$343,028 in current 2003 dollars per consumer.

(2.) **Duplexes**

Throughout the country, developmentally disabled persons have been successfully housed in the community in new or remodeled duplexes. This type of housing has been adapted to accommodate persons with enduring medical needs. In Kansas, for example, the "Teaching Family" model has been successfully employed to house 3-4 developmentally disabled persons in the same duplex under the care and support of a certified, trained family that shares the other half of the duplex. The major costs for developing duplexes include land price, hard construction costs, financing fees, and soft costs. Total costs per consumer would range from \$173,674 in Alameda County to \$316,231 in San Francisco. Assuming enough stock of suitable duplexes for remodeling, the cost would be reduced to \$190,462 in Alameda County to \$282,272 in San Francisco.

(3.) **Single Family Homes**

Single-family homes can be built or modified to accommodate the needs of consumers living in a supported living environment. Though less common, it is also possible to modify single-family homes to meet the needs of medically fragile persons. New construction of this type of housing would range from \$150,766 to \$348,005 due to the variance in land values among the three counties. Remodeling costs of single-family homes per consumer would range from \$189,355 to \$307,596. Actual costs across the Bay Area region would more likely be close to \$250,000 per consumer for a remodeled home.

(4.) **Casitas/Cottages**

This type of housing would allow for single persons to live in a small, private residence built around a courtyard or common area. With supportive service, this model would allow for a high level of both privacy and independence, while also allowing for community interaction and support. Development cost for this type of housing would range from \$159,853 to \$403,009 per unit.

(5.) **Apartment Units**

Dedicating a small percentage of apartment units for the developmentally disabled consumers within a larger apartment complex is one way to maximize opportunities for community interaction while also leveraging the expertise of the private development community. This model, however, has proven sometimes problematic with conventional developers often not understanding how to create a barrier-free environment suitable for an individual with physical and/or cognitive disabilities. Based on a hypothetical development budget for a 50-unit apartment complex with 10 percent of the units (5 units) customized for developmentally disabled tenants, the cost per barrier-free unit would be almost \$15,000 higher than the other units in the project. In total, this type of housing would cost a range of \$180,907 to \$240,880 per consumer as a low estimate based on a very modest calculation of parking space costs.

Another, possibly more economical, way to secure apartment units is to buy down rents in an existing development project, particularly prior to project completion. This would involve negotiations with the developer to have a percentage of the rents (5-10 percent) be bought down in a particular development as permanent housing for persons with developmental disabilities. A deed restriction would be placed on the development guaranteeing availability of those units at the predetermined rent structure. To ensure that qualified, developmentally disabled tenants fill the units, a third party is needed to maintain a wait list of prospective tenants.

The overall range of costs, to house 160 persons with significant medical needs and 220 others with various developmental disabilities, is between \$73 million and \$120 million. This range of cost estimate assumes that the persons with significant medical needs will live in a model that costs are similar to the LSA model and the others will live in one of the four housing types described above.

g. **Financing Strategies**

The ultimate goal is to build it right and build it once to satisfy the needs of the individuals leaving Agnews. Financing strategies to build permanent, affordable housing include, but are not limited to, the following: Applying for four percent Low-Income Housing Tax Credits, Tax-Exempt Private Activity Bond financing, California Department of Housing and Community Development Multi-Family Housing Projects funded by Proposition 46, and Fannie Mae funds to build pilot projects in the community. Given the limitations of leveraging funds from these sources to cover the total cost of necessary housing, a dedicated pool of funding must be identified at the State level to successfully relocate and house persons leaving Agnews.

Resale of the land around Agnews is one important consideration for creating a dedicated source of funding to finance the total housing costs of the Bay Area Project. The following estimates are based on calculations from the Department of General Services for the year 2000. There are approximately 87 gross acres at the campus along with 527,750 sq. feet of improvements at the East Campus of Agnews. It is assumed that the City of San Jose would favor Office/R&D zoning and would grant entitlement for approximately 2,500,000 sq. ft. of buildings. That would support a land value of at least \$30/sq. ft and an estimated net value of \$105,750,000 less demolition costs.

Summary of Calculations:

87 acres @\$30/sq feet= \$113,700,000
 Less Demolition costs (527,750 X \$15)= \$7,916,000
 Estimated Net Value= \$105, 784,000

According to an analysis completed by real estate professionals, these numbers are very high based on today's market and for at least the next two to five years. The possibility of finding a developer or a corporation that would pay \$30/sq. foot is unlikely, even though Cisco may have an interest in the property. Current 2003 land values in the Agnews area, based on Office/R&D, is actually between \$5-\$10/ sq. foot. If the property were developed for residential/retail, the land would sell between \$30-\$40/ sq. foot. The difference in net value between these two land uses range between \$19 million and \$152 million, approximately. Should the property be zoned residential/commercial, we would recommend that a percentage

of the new housing built be permanently set aside for persons with developmental disabilities as was the case with development of the West Campus property (Rivermark). We realize that the sale of the land with a possible bond is only one solution to financing this housing pool. It is up to the Legislature to decide what is the best way to dedicate this funding.

Another important recommendation is to ensure that the development budget of any new housing projects include operational reserves sufficient to cover the costs of management and maintenance of the housing built for persons with developmental disabilities. In Oregon, for example, the Oregon Housing and Community Services Department (OHACS) sold Oregon General Obligation Bonds to finance the housing for persons with developmental disabilities. These bonds were attached to specific houses. The maintenance and repair fund was necessary to protect this asset. This fund is accessed by specific requests and regulated through an approval process.

We will also be exploring financing options with the Fannie Mae's Community Living loan program which is designed to provide financing for small, community-based homes for children and adults with disabilities who are unable to live independently: Even though the current program is for group homes, we will proceed to see if we can modify the program to fit our needs.

We have identified the housing types, the range of cost for each of these housing types throughout the San Francisco Bay Area, and identified funding strategies to pay for it. We believe that additional work will be needed to further identify finance strategies for each of the housing types. We are proud to submit our report as the beginning to this unique journey of creating homes for people with developmental disabilities transitioning into the community from Agnews Developmental Center.

h. **Barriers And Solutions:**

Related to each of these recommendations are barriers that need to be addressed and the following solutions are offered for consideration to move forward with the housing component of the Bay Area Project.

Appropriate Housing Components:

(1.) **Community Building**

Barrier: Moving Agnews' residents from a familiar community into a new community.

Solution: Create a welcoming community for the Agnews residents with supportive staff, and a resident coordinator to help build community relationships.

Solution: Develop criteria for selection of a specific agency to provide ongoing tenant placement and coordination of services.

(2.) **Customized to Fit Individuals' Needs**

Barrier: Lack of a housing and services combined needs assessment of residents living at Agnews.

Solution: Administer Housing Survey to Agnews' residents, family members, and staff and review IPP to determine housing needs of each individual.

Solution: Need to balance the individual's freedom of choice with consideration of their health and safety needs.

(3.) **Separate Ownership of Housing and Services Delivery**

Barrier: Resistance to new housing models that differ from the current state-run institutional model.

Solution: Demonstrate successful pilot models that separate ownership from services using non-profit companies.

Barrier: Families feel insecure putting their developmentally disabled adult children into housing in the community because they fear it is not permanent and stable housing.

Solution: Have non-profit companies own the housing units so they are designated to serve the developmentally disabled population and when one developmentally disabled individual moves out of a unit, another Developmentally Disabled individual can move in.

(4.) **Small Number of Units Clustered Together**

Barrier: Housing too many developmentally disabled persons in one housing unit deters from full integration of individuals into the community. Although a small clustering of developmentally disabled is sometimes desirable.

Solution: No more than five developmentally disabled persons will live together and ideally no more than three or four will live together.

Solution: Housing options will include a separate bedroom for each individual.

Barrier: Too many developmentally disabled persons in one housing complex are not optimal because it promotes dependence on the developmentally disabled group and discourages interaction and involvement in the larger community.

Solution: No more than 10 percent of the units of a housing complex will be designated for persons with developmental disabilities.

Solution: Property Management will be better able to manage small groups of developmentally disabled living on a property.

(5.) **Located Near Service Hubs and Community Services**

Barrier: Finding a sufficient number of appropriate housing for developmentally disabled that is near service hubs and non-profit services as well as medical facilities and police and fire departments.

Solution: Identify sites throughout the Bay Area and development projects that are near these services.

Solution: Incorporate these considerations of geographic amenities into the development financing applications to secure competitive points such as for Tax Credit funding.

(6.) **Design Features**

Barrier: Cost of customization may be high.

Solution: Work with architects and contractors with experience building special needs housing to use the most cost effective materials and products.

Barrier: There is a need for security of the housing in the community.

Solution: Change licensing regulations to allow locked or delayed egress from homes.

(7.) **Cost of Housing Types**

Barrier: Current affordable housing is not designed for persons with developmental disabilities nor is it affordable enough for their very low, fixed incomes.

Solution: Create a rental subsidy fund to assist with rent payment.

Solution: Create several design templates that are cost effective and environmentally sensitive to guide new developments so they will be appropriate for persons with developmental disabilities.

Barrier: We do not have a continuum of housing models for persons with significant medical needs.

Solution: Build on lessons learned from the LSA housing model in Santa Clara, California and other innovative models from across the country.

(8.) **Financing Strategies**

Barrier: Dedicated source of funding may be difficult to establish.

Solution: The resale and development of the land could create a pool of funds dedicated for housing for persons leaving Agnews.

Solution: Create legislation that makes more funding available at the state and federal levels.

Barrier: Need to have adequate funding for operations and maintenance.

Solution: Include these costs in the development budget to be included in funding applications.

Barrier: We do not know the total cost of housing for persons leaving Agnews.

Solution: After conducting the housing needs assessment of individuals living at Agnews, use the information as the basis for an economic analysis of the cost of housing types that are available on the market and also in development or that could be developed in the near future.

Barrier: It takes 24-33 months to build new affordable housing projects and each project would only house a few developmentally disabled persons.

Solution: Utilize the design templates to facilitate the development process and control costs.

Solution: Coordinate several development projects simultaneously.

Solution: Search for existing homes on the market that can be modified for persons with developmental disabilities.

Solution: Meet with City Housing Department staff and developers to identify potential collaborations on new developments with a set aside of units for developmentally disabled persons.

Barrier: Need to create more community awareness about new models of housing available to persons with developmental disabilities.

Solution: Educate all stakeholders using fact sheets, videos, and photos of existing models.

i. **Implementation Plan**

- (1.) Create a fact sheet about Agnews' residents' housing needs.
 - (a.) Identify number of residents that will be moved into the community.
 - (b.) Identify available housing models that are appropriate to accommodate persons with developmental disabilities.
- (2.) Conduct a service and housing needs assessment of current residents of Agnews.
 - (a.) Utilize the IPP as a guide to match individuals with appropriate housing models available in the community.
 - (b.) Utilize the IPP to identify appropriate housemates for each individual.
- (3.) Research and gather information from all conceivable sources about existing housing models and design components for persons with developmental disabilities.
 - (a.) Interview experts, educators, developers, architects, consumers, family members, and service staff.
 - (b.) Visit housing models and record best practices.
- (4.) Design four to five housing templates to educate all entities involved in housing development.
 - (a.) Contract with architects with several years of experience developing special needs housing.
 - (b.) Create design templates that are economical and energy efficient and adaptable to a variety of housing types.
- (5.) Conduct economic analysis and political analysis to determine where to develop housing for persons with developmental disabilities.
 - (a.) Contract with an established Bay Area economic consultant.
 - (b.) Assess the cost of housing types and the market availability to serve the residents of Agnews.

- (6.) Consult with housing experts to prioritize components of the housing development plan and identify criteria for the request for proposal (RFP) process.
 - (a.) Consult with the Directors of the three regional development centers in the Bay Area Project.
 - (b.) Consult with developers, planners, lenders, evaluators, and educators.
 - (c.) Consult with the Board of Bay Area Housing Corporation.

- (7.) Establish a financial entity to set up the RFP process and receive and rank development proposals.
 - (a.) Contract with Lenders for Community Development with expertise and qualified experience in the Bay Area.
 - (b.) Establish the proposal criteria of the RFP and evaluation methodology.

- (8.) Develop financing strategies.
 - (a.) Establish partnerships within the housing development community.
 - (b.) Research new sources of funding.
 - (c.) Identify and apply for all existing types of funding available

- (9.) Educate the community and all stakeholders about funding opportunities to develop new models of customized housing for persons with development disabilities.
 - (a.) Use the design templates to guide the proposals submitted from the development community.
 - (b.) Advertise the RFP through all channels of communication to reach housing developers and housing advocates.

- (10.) Send out the RFP.
 - (a.) Collect proposals to develop permanent, affordable housing that is energy efficient and customized to suit the service needs of persons with developmental disabilities.
 - (b.) Review and rank proposals.

- (11.) Evaluate the proposed housing models.
 - (a.) Contract with a qualified evaluator to assess that the models build community and contain appropriate design components.
 - (b.) Forward the proposals to the Directors of the three regional development centers for final evaluation and allocation of funding.

- (12.) Identify available land and communities that want to develop housing for persons with developmental disabilities.
 - (a.) Contract with economic and political advisors to identify resources and local government support for this type of housing project.
 - (b.) Establish relationships with local government leaders, planning department staff, lenders, housing advocates, management companies, and service providers.

- (13.) Build pilot housing projects.
 - (a.) Contract with developers to build selected housing models.
 - (b.) Evaluate the development process and final product.

8. **SERVICE HUBS**

Agnews has been an integral part of the Bay Area developmental service system for the past 40 years. The re-engineering of this services system should result in a future that makes sense for the persons who reside at Agnews, their families, the staff who serve them, and the community that they will live, work and play in.

There are two goals of the Bay Area Project that differentiate it from prior developmental center closures in California:

- a. Every person who currently resides at Agnews should have the opportunity to relocate into a community setting that is close to their family. The vast majority of persons who reside at Agnews have families that are an important part of their lives. The majority of these families reside in the Bay Area. Consumers and their families have expressed a strong interest in continued access to services in this area.

- b. The developmental services system in the Bay Area should be strengthened and enhanced through the implementation of the Bay Area Project. This would include the expansion of a safety net for persons whose needs exceed the capacity of available resources; improved access to the full range of quality services required by regional center consumers in the Bay Area; strengthened partnerships within the service system; and support of best practices and state-of-the-art services throughout the system. Charting a course that promotes the retention of current Agnews' staff and their expertise is a critical component of this initiative.

Regional Service Hubs will be the way that the State provides direct and support services to promote these goals. They will include three basic elements.

(1) **Direct Services:**

The State will ensure the provision of an array of stable living arrangements that will have the capacity to meet the full range of needs of the persons who reside at Agnews, and will be available to regional center consumers who have exhausted the established service system. The “safety net,” a system that will provide services when other resources have been exhausted, for the Bay Area will be preserved and enhanced. These arrangements will include traditional models as well as newly developed approaches. Education, training, and work services will be provided, when necessary, as a distinct service, or as a “wrap-around” component of the residential service.

The hub will also provide a range of other services to persons within the region. These may include services to promote health and wellness, to stabilize psychiatric and behavioral issues, to support stable living arrangements for persons with their families or in other residential settings, and to build a sense of community. Every effort will be made to work with the person in their current residence and to partner with the person’s established support system.

(2) **Support Services:**

The hub will become a “center of excellence,” promoting best practices throughout the area. It will provide orientation and training as well as consultation and support to the developmental service system and its partners. The hub will also support traditional Regional Project activities as well as Senior Companions and Foster Grandparents.

(3) **Community Partnerships:**

The hub will be a catalyst for the establishment of partnerships with universities and major medical centers through direct contracts and fellowships. It will be a resource center that provides current information regarding resources, best practices, and events. The hub will be a part of the community that enhances and supports generic services. It will assure that specialized staff is available, through contracts or vendorization, to service providers, families, and consumers. The hub will not duplicate or compete with established available and readily accessible services.

The configuration of services will be determined by the needs and preferences of persons placed from Agnews as well as the capacities and needs of the region. Services will be developed to meet individual needs identified through the team process. The consumer and his/her family will have an opportunity to participate in the design and implementation of the system that will serve them. Services will also be engineered to promote quality, and prototypes will be developed and evaluated to assure their effectiveness prior to replication. Every effort will be made to transition staff in a way that assures continuity of care and is sensitive to the strengths and skills of the staff.

(1.) **Recommendations**

(a.) **General**

- (1) Each service hub will serve a regional area. The range of services provided in a particular area will be determined by the needs of persons who currently reside at Agnews who choose services in that region and the needs of the existing community service system. Some of the services will be “site based,” while others will rely on community and natural supports.
- (2) State staff will be made available when it is determined that either their participation is necessary for continuity of quality care for the person, or when their expertise is not readily available in communities served. The system will be established to assure prompt access to the full array of needed services. The hub will not duplicate nor compete with established resources.

- (3) Strategic partnerships with community resources such as universities and hospitals/health care systems will be developed. Fellowships and residencies will be supported to promote both professional education in developmental services and the availability of stable and needed services.
- (4) People are counting on us for stability. The State must make a commitment, on a policy level, to provide direct services, when necessary, to meet the needs of persons placed from Agnews.
- (5) Services will be developed in a manner that assures stability, builds community capacity, and promotes excellence.
- (6) Services will be phased-in to permit the development and refinement of service models prior to their replication.

(2.) **Living Arrangements**

- (a.) A range (including traditional and innovative models) of state-operated living arrangements will be made available both as a service choice for persons who reside at Agnews and as an ongoing resource for other regional center consumers who require a level of services that is not available in other settings.
- (b.) Direct and professional staffing for state living arrangements will be consistent with the needs of the persons served as identified in the IPP.
- (c.) Living arrangements will promote the stability of the individuals that they serve by providing additional services in the person's home as his/her needs change.
- (d.) Residential staffing ratios will be sufficient to permit the consumer's participation in either established work/training settings or opportunities provided by the residence; i.e., "wrap-around" services.
- (e.) Homes will promote community integration and be located so that they have access to essential community resources. Living arrangements that are supported by the hub should be located to assure access to the hub service center.

Living arrangements will have the capacity to provide transportation necessary to promote integration and access to community services. Every effort will be made to provide additional services in the person's home; movement to another setting will be the last alternative considered.

- (f.) The hub will have the capacity to provide short-term access to specialized residential services for persons with extraordinary behavioral or medical needs. Every effort will be made to provide additional services in the person's home; movement to another setting will be the last alternative considered.
- (g.) The Hub will support development of a Family Home Agency that recruits, screens, trains and supports persons that want to make a consumer part of their family. There will be significant recruitment activities that are focused on existing Agnews' staff that have established relationships with persons who reside at Agnews.

(3.) **Direct Supports**

- (a.) The hub will establish both professional and direct service staffing registries that provides staff, on a cost-reimbursement basis, to direct service providers, or as a regional center vendor to support families; e.g., respite. Staff will be made available on long-term contracts as well as on a short-term, task-specific basis. This will include supplying staff for such needs as crisis intervention, proactive assessment and training, and providing supports that stabilize a person in their home.
- (b.) Primary care physicians and a range of other professionals will be made available through the hub to serve persons who reside in state-operated facilities as well as other regional center consumers who have complex service needs. Services may be provided on a continuing basis or for a time-limited period (assessment and consultation) as determined by the person's needs.
- (c.) The hub will provide access to medical, nursing, psychiatric, dental, psychological, and rehabilitation services. It will also be a resource and support for adaptive equipment and recreation, leisure, and spiritual services. Pharmacists and dieticians will be available.

- (d.) The hubs will provide/ensure day training/work opportunities for consumers who require a level of service currently not available/accessible in other settings. The services will ensure continuity of services with the living arrangement and provide required behavioral and medical interventions.

(4.) **System Supports**

- (a.) The service hub will provide professional and educational training. The training will offer continuing education credits and include best practice and contemporary issues. Training will be made available to families, consumers, service providers, regional center and state staff, direct service and professional staff, and the community at large.
- (b.) A 24-hour “advice line” will be established that provides guidance to families and to service providers.
- (c.) Regional Project services (assessment, follow-up for recent discharges) will be provided through the hub.
- (d.) Foster Grandparents/Senior Companions will be supported through the hub.
- (e.) State staff will be made available to support regional center activities. This may include clinical support (assessment, plan development, training, monitoring) to regional center staff as well as community development activities in a range of professional and support areas.

(5.) **Community Partnerships**

- (a.) Strategic partnerships will be established with universities and major medical centers through the hub. Specialized staff will be made available to consumers, their families and service providers as an augmentation to established and readily available and accessible services.
- (b.) The hub will seek out professional resources through fellowships, residencies, and internships to provide current information on resources, best practices and contemporary issues.

- (c.) Outreach education related to individuals with developmental disabilities will be provided through the hub to the community at large, including schools, hospitals, government agencies, public service organizations and religious groups.

(2) **Barriers And Recommendations**

(1.) **Fiscal**

Barrier: The Medi-Cal rate is not sufficient to cover the costs for state-operated residential and support services.

Recommendation: *Revise the State Plan for persons with developmental special needs who reside in the Bay Area. The modification will need to include an extension of the “settlement to actual costs” model for residential and support services, and a “specialized rate” for outpatient services to persons who do not reside in state-operated facilities.*

Barrier: The existing Waiver did not anticipate the closure of Agnews. It does not include the full range of services that will be provided through the Bay Area Project.

Recommendation: *Amend the waiver to include the number of Agnews’ residents who will be served in community services as a part of the Bay Area Project. Expand the scope of the Waiver to include additional services.*

Barrier: The cost for day training/work for persons who reside in long-term health facilities is not eligible for federal participation.

Recommendation: *Include the cost for day programs in the rate for long-term ICF/DD-H and ICF/DD-N programs.*

(2.) **State Staff**

Barrier: Established labor agreements do not anticipate the transfer of staff to community settings.

Recommendation: *Negotiate additional provisions to the contracts that will apply to Agnews’ staff. The provisions will need to speak to how staff will be selected for reassignment, reporting relationships, and working conditions.*

Barrier: Current job descriptions do not reflect the range of duties that will be required for staff in their new assignments.

Recommendation: *Revise job descriptions.*

Barrier: Agnews' staff will require training to support their transition to community services.

Recommendation: *Secure funding for staff training (trainers and release time).*

Recommendation: *Develop/implement training plan.*

Barrier: Existing law does not permit a person to preserve their PERS benefits and service time when employed for a regional center vendor.

Recommendation: *Revise law to permit existing Agnews' staff to transfer their employment to private vendors without losing pay, benefits, and retirement; or*

Recommendation: *Permit regional centers to provide direct services and to employ existing state staff.*

(3.) **Developmental Service System**

Barrier: The existing operations allocation for regional centers does not include clinical staff for community development activities.

Recommendation: *Revise the operations budget for Golden Gate, San Andreas, and East Bay Regional Centers to permit the addition of clinical staff (medical and behavioral) that is dedicated to expanding access to community services and available to provide consultation to regional center staff and their consumers.*

Barrier: Existing regulations do not permit the vendorization of state services by regional centers.

Recommendation: *Revise regulations to permit vendorization of community services provided by the State.*

Barrier: Established policy does not support the provision of direct services by state staff to persons who are not residents of state facilities.

Recommendation: *Revise policy to promote.*

Barrier: Current policy does not promote the transfer of state equipment to private nonprofit providers who are serving the target population.

Recommendation: *Revise policy to support the concept that the resources follow the consumers.*

Barrier: The authority of the State to provide direct community services and to establish partnerships with regional centers and private vendors is not well established.

Recommendation: *Secure enabling legislation.*

Recommendation: *Draft supporting regulations, if necessary.*

Barrier: The current rate structure does not support stable services.

Recommendation: *Implement the Service System Reform recommendations.*

Barrier: Existing residential service licensing categories are not consistent with best practice and securing full federal participation.

Recommendation: *Expand scope of categories for the Department of Social Services (DSS); or*

Recommendation: *Secure authority of the Department to license/approve residential services.*

(3) **Implementation Plans**

This implementation plan identifies the significant outcomes that will be accomplished and those activities required to achieve the identified goals. The plan begins with the completion of the workgroup's activities and continues through the completion of the closure. Goals are grouped into major areas of Consumer Supports and Services, Service Hub Organization, and Staff. While the goals in each task are sequential, in terms of when work begins, it should be understood that a number of goals would be worked on simultaneously. Some of the goals; i.e., 12-16, include activities that will be pursued a number of times throughout the implementation process. Finally, the plans identify what needs to be accomplished. The timelines and the responsible persons/organizations will be determined during implementation.

(1.) **Consumer Supports and Services**

Goal 1. Determine Need.

- (a) Complete analysis of preliminary consumer data to determine number of consumers who will require supports, the nature of their need, and their preferences.
- (b) Conduct and review regional needs assessment to identify the role that the service hub should play in each community.
- (c) Coordinate need analysis with the other Community Development Team workgroups to finalize the estimate of the service scope.
- (d) Continue to refine the estimate as discussions with consumers and their families and community development progresses.

Goal 2. Develop Service/Cost Models/Assure Federal Financial Participation.

- (a) Establish an array of residential and support service models that include the number of persons served in each location, the staffing required, and associated costs.
- (b) Refine staffing/costs as the specific persons to be served are identified, and service locations are identified/developed.
- (c) Provide information regarding costs to the administration and to the Legislature for review and approval.
- (d) Review current waiver and State Plan with Department of Health Services (DHS) to identify necessary amendments and to determine any statutory changes needed.
- (e) Complete required amendments with the goal of supporting the hub and expanding the level of federal participation.

- Goal 3. Develop Strategic Partnerships.
 - (a) Identify potential partners including, but not limited to, vendors/licensees, medical centers/plans, universities.
 - (b) Negotiate working agreements that will promote excellent services that people can count on.
 - (c) Identify and provide required resources.

- Goal 4. Develop Direct and Support Services Identified in the Plan.
 - (a) Develop specifications of site (location, size, costs) based on needs assessment and regulatory requirements.
 - (b) Secure (locate/rehab. /construct) site.
 - (c) Equip site for services.

- Goal 5. Build Bridges with Neighbors/Community.
 - (a) Establish strategy to promote support from service location neighbors, based on the location, use, and target population.
 - (b) Provide orientation/open-house as indicated.
 - (c) Make adjustments to service design/practices.
 - (d) Establish system for ongoing communication

- Goal 6. Provide Services.
 - (a) Initiate services when it is determined that the service setting fully meets established criteria.
 - (b) Monitor services to assure effectiveness.
 - (c) Provide transitional supports to resolve identified barriers and issues.

(2.) **Service Hub Organization**

- Goal 1. Establish Partnership with Regulatory Agencies.
 - (a) Provide orientation to Bay Area Project Proposal to regulatory agencies as the plan is being reviewed.

- (b) Identify barriers and identify resolutions on a policy and resource level.
- (c) Discuss implementation strategies with regional offices.
- (d) Identify contact person to promote communication and coordinate implementation.

Goal 2. Secure Required Authority to Provide Services.

- (a) Secure enabling legislation for the State to participate in the direct provision of services and for current Agnews' staff to transition to community services.
- (b) Determine license/certification required for each service model based on a review of current law and regulations.
- (c) Prepare and submit application to identified regulatory agency.
- (d) Secure license/certification.
- (e) Apply for and obtain vendorization from regional center, if applicable.

Goal 3. Identify Outcomes and Strategies for Direct and System Supports.

- (a) Establish operational and consumer-desired outcomes for each service element.
- (b) Develop program designs, operational strategies, and guidelines for each service element.
- (c) Create policies and procedures.

Goal 4. Establish System Design for Each Service Hub.

- (a) Determine the range of service elements required for each service region.
- (b) Evaluate the regional supports that will be required.
- (c) Establish a regional service plan that specifies elements, supports, and critical criteria.

- (d) Establish organizational design for hub(s) to support elements.
- (e) Establish service design consistent with the strengths, needs, and preferences and the target group identified. The design will include staffing and support requirements.
- (f) Develop business plan that identifies how services will be provided, the resources required, and the methods to assure quality services.
- (g) Develop service models for each component of plan.
- (h) Establish strategies to promote the successful transition of persons who are served.
- (i) Identify outcome indicators that are critical to the consumers and indicators that are significant to the service setting.
- (j) Develop policies, procedures, and operational strategies.
- (k) Implement service model; evaluate, adjust design.

Goal 5. Identify Service Area and Location Targets.

- (a) Determine specifications for each hub (resource access, size, scope, area).
- (b) Identify target service area based on specifications.
- (c) Locate site for central support core.
- (d) Locate service sites based on integration and proximity to core.

Goal 6. Identify/Evaluate Resources Available and Needed.

- (a) Determine best use of existing Agnews land/buildings.
- (b) Complete inventory of existing equipment.
- (c) Determine whether equipment/resources can/should be used in hub services.
- (d) Identify additional resources needed and costs.

- (e) Secure and deploy resources as indicated.

Goal 7. Design System to Evaluate Services and to Adjust Plans as Indicated.

- (a) Establish system to collect and analyze the desired outcomes.
- (b) Develop process for internal and external review of outcomes.
- (c) Develop work plans for the development and implementation of services.
- (d) Monitor, review, and report on work plan implementation.
- (e) Adjust services/plans based on performance.

(3.) **Staff**

Goal 1. Support the Transition of Staff.

- (a) Negotiate the process for the identification/selection of staff that will transfer to the Service Hub with appropriate labor organizations.
- (b) Establish job descriptions to reflect duties in hubs.
- (c) Select staff in a manner consistent with the agreements.
- (d) Develop curriculum to assure that staff will be successful in the new service settings.
- (e) Provide training for the staff in their duties and opportunities/issues that they will encounter in new service settings.
- (f) Secure statutory authority to support the transition of state staff to other employers.
- (g) Phase-out the participation of the State in direct services.

(4.) **Guiding Principles**

- (a.) A center of excellence that promotes state-of-the-art services and promotes best practices throughout the developmental service system.
- (b.) A regional resource that provides a safety net for persons whose needs exceed the capacity of established resources.
- (c.) A part of the community. It enhances and supports other services. It does not compete with or duplicate established service elements that are available at needed levels.
- (d.) Engineered to promote quality and to maximize federal participation.
- (e.) An enabler and a provider that assures access to the full range of quality services that are available when they are needed.
- (f.) A service option to current Agnews' residents.
- (g.) A catalyst that builds partnerships within the system.

9. **SUPPORT SERVICES**

a. **General Recommendations**

- (1.) The State of California shall make a commitment to provide 'whatever it takes' to provide services and supports that will enable individuals leaving Agnews to be successful on a long-term basis. This must include the commitment to retain the resources currently dedicated to Agnews' consumers as they transition to community services.
- (2.) Support services will be developed that are creative and flexible and have variety. A goal of community supports is that consumers be included as genuine participants in their communities and have the opportunity to interact with people without disabilities. Emphasis will be placed on the consumer's choice in terms of the support services they wish to utilize.
- (3.) Although some existing day services and supports may work for some consumers, the support services shall not be locked into current program models.

- (4.) Recreation services and supports will be developed that provide an opportunity for consumers to gather for socialization and contact with persons of their choice with and without disabilities and participate in leisure activities. The recreation services shall be flexible and creative, and shall use existing generic recreation sites in the community as well as locations specifically developed for consumers with developmental disabilities. All services shall encourage integration of disabled and non-disabled individuals.
- (5.) A key feature of all services and supports is a sense of belonging and community, which shall be encouraged in design and implementation. Services and supports shall be developed to respond to the individual first, rather than attempting to fit an individual into an existing resource that may be unsuited to his or her needs.
- (6.) Wages and benefits for staff must reflect the cost of the geographic region where the service/support is provided, provide continuity, and reduce staff turnover. Rates for providers must also be adequate to allow them to meet their program design and the goals of consumers served in light of the cost of doing business in the geographic region. This includes funding provider rates and staff wages to a level that eliminates the inequity of the 'two-tiered' funding system currently seen between state-owned and community-owned services.
- (7.) Auxiliary supports, such as crisis response teams, equipment repair programs, and transportation services, shall provide high quality, professional services and ensure stability for the consumers in the community.
- (8.) Initial and on-going training shall be provided to staff providing support services for consumers leaving Agnews. The expertise of Agnews' staff and of staff experienced in providing quality community supports shall be a resource to provide this training. Training shall be relevant and flexible to adapt to the changing needs and preferences of the consumer. Agencies will be compensated for the appropriate training of staff.
- (9.) Consumers leaving Agnews shall continue to have access to quality medical and nursing care.
- (10.) Innovative service and support options shall be developed and not be restricted by current licensing and/or vendorization regulations.

- (11.) Services and supports for day activities and recreation shall be close to the consumer's home to minimize transportation time.
- (12.) Regional centers shall have the fiscal and personnel resources necessary to develop the services and supports described in these recommendations.

b. **Day Services and Supports**

All day services and supports developed shall have workplace accommodations for safety and accessibility. Staff support shall be available to all consumers, regardless of their disability. Activities and/or jobs shall be flexible and change with the consumer's skill level and interest. Day activities shall have varying times and days, including evenings and weekends, if desired, and shall vary in size based on the type of activity and consumer performance. Sites shall be small enough to meet individual needs/preferences. Activities shall be varied, stimulating, and satisfying; offer community integration; and be based on the consumer's needs and preferences. There shall be a range of day activities in the community that allow consumers to choose a service that works for them.

- (1.) **Daytime Services and Supports for Persons who are Medically Fragile:** Develop services and supports, which enable consumers who are medically fragile to participate in a variety of day activities. Trained staff shall include nursing staff and specialists (nutritionists, physical therapists, occupational therapists, etc.). Offsite programs shall be close to the consumers' home to minimize transportation time. Hours shall be flexible so consumers can attend as health permits.
- (2.) **Daytime Services and Supports for Persons with Challenging Behaviors:** Develop services and supports that enable consumers with challenging behaviors to participate in a variety of day activities including work. Staff shall be trained in behavioral analysis and the program shall have ongoing professional behavioral consultation to design and implement the best training techniques and monitor effectiveness. Individual and small group settings shall be available to help reduce the likelihood of behavioral incidents.
- (3.) **Mobile Day Services and Supports:** These services and supports shall be designed to work with consumers who have medical and/or behavioral challenges or otherwise prefer an individualized option. The mobile day programs bring the activities

to the consumer. The consumer has the option of doing activities at home and/or in the community.

- (4.) **Vocational Services and Supports:** Paid and volunteer work shall be available regardless of disability. These work activities shall utilize existing skills, teach new skills, and allow individuals to become a member of the local community workforce. Jobs shall be secured which pay consumers at least the same wage as they received while living at Agnews. Adequate staff shall be available to support persons to be successful in their jobs. Program staff shall also include a job developer to find employment in the community and ensure necessary accommodations are made in the workplace. Agnews' consumers shall not receive less pay than what they had received in their prior job.

c. **Recreation and Leisure Services and Supports**

Recreation and leisure services and supports shall provide opportunities for interaction with disabled and non-disabled people of all ages. Activities shall be available year round (any season), including weekends or evenings. The services shall encourage the creation of a 'circle of friends' and maintaining existing relationships. Medical, behavioral, and personal supports shall be available for every consumer to participate in these services.

- (1.) **Recreation Centers:** Develop specific centers that provide a variety of activities for consumers. These centers shall have activities during day hours, as well as weekend and evenings. There shall be ongoing activities (e.g., cooking classes, art work, games, sports, etc.) and special events (e.g., dances, parties, dinners, reunions of Agnews' friends, etc.). There shall be activities that allow 'drop-ins' as well as regularly-scheduled, planned activities. There shall be a variety in the size of the group (small and large groups), and activities that fit a wide range of physical abilities. There shall be space for quiet activities separate from louder activities. It is encouraged that recreation centers be developed in existing community center sites to help bring about community integration. New sites shall be developed in partnership with existing community recreation centers. Recreation centers shall be open to all individuals with developmental disabilities. Staff shall include experienced recreation therapists and occupational/physical therapists, as needed.

- (2.) **Recreation Facilitators:** Develop a group of trained facilitators who will assist providers in planning and implementing a rich leisure/recreation program for the consumer. The support staff that is involved in the consumer's daily life shall provide services in natural environments to enhance community participation. Innovative contracting (including partnerships and shared resources) with outside agencies shall be incorporated into this service.
- (3.) **Existing Community Resources:** Develop a working relationship with existing community resources (parks and recreation programs, YMCA, Little League, Special Olympics, bowling leagues, etc.) so consumers can access these programs. Creative incentives shall be offered to encourage generic agencies to include consumers regardless of their level of disability. Experienced staff shall train generic agencies about individuals with special needs and provide additional support as needed for access. Regional centers shall have the staff and resources needed to assist in expanding opportunities for the full participation of people with developmental disabilities in their local communities as provided in Welfare and Institutions Code Section 4688.

d. **Living Options Services and Supports**

Living option supports help consumers live safely, maintain and improve skills, have access to their neighborhoods, enjoy a stimulating home environment, and have their needs met in their chosen place of residence. There shall be a 'pay for it once' philosophy that separates the vendor providing the support services from the owner of the housing. Consumers shall have financial support for move-in costs if they wish to live in their own home. In general, homes with small numbers of consumers are recommended to allow for greater individualization of services, depending on the preference of the consumer. Training shall be available and funded for support services on an ongoing basis.

- (1.) **Services and Supports for Home Settings:** Support services in a consumer's home shall have staffing patterns based on individual needs and preferences and shall not be dictated by an existing model that may not fit. Staffing shall include specialized staff in a variety of areas (medical, behavioral, etc.) and shall be available for consumers in whatever housing option they select. A model mentoring program option shall be developed which would provide assistance to new providers by partnering them with existing

excellent providers in starting a living option for consumers. Innovative living arrangements shall be developed with quality monitoring provided by the Department, rather than by DSS or DHS licensing, where appropriate, to meet consumers' needs and preferences.

- (2.) **Crisis Beds and Transitional Housing:** Develop crisis beds that can be used for consumers who cannot live at home because of a medical or behavioral crisis. Ideally, two distinct types of crisis home concepts shall exist—medical and behavioral. In addition, transitional housing shall be developed which allows consumers to live elsewhere for a limited period of time because of extraordinary but temporary needs (such as evictions or household remodeling, etc.) but who are not necessarily in a 'crisis.'
- (3.) **Respite Services and Supports:** Out-of-home respite services shall be developed, for consumers who are not in a crisis, to stay for a short period of time. This gives family members a break from the constant care and supervision that a consumer requires. In-home respite services and supports shall also be available so the consumer can continue to live at home while the family gets the break that they need. These services and supports shall be available for any consumer, regardless of the level of their disability, behavior, medical needs, or other services they are receiving in the community.

e. **Auxiliary Supports and Services**

These supports shall be developed so that consumers, families, and their support staff can access them easily. Crisis supports shall be available 24 hours a day, 7 days a week. These services and supports shall provide expertise and trained staff to assist an existing service provider or family member with support for consumers with extraordinary needs.

- (1.) **Mobile Crisis Response Teams:** Develop response teams of medically and behaviorally trained staff who can go to a day program, recreation program, or a person's home to help with a crisis. Teams shall be able to provide skilled intervention, including substitute staffing and the administration of medication, if necessary. Intervention shall continue to be provided until a consumer's placement is stable.
- (2.) **Equipment Repair/Site Modifications:** Develop services and supports that can design, build, and modify equipment

(wheelchairs, feeding chairs, walkers, etc.) for consumers. A place to repair the equipment as well to keep necessary tools is required. Occupational and physical therapy services shall also be available to recommend modifications to a site. Funding shall be available to complete the recommended modifications.

- (3.) **Transportation:** Develop a transportation system for all consumers regardless of the level of disability. Vans shall have lifts and other modifications to accommodate the unique needs of Agnews' consumers. Additional staffing shall be provided, as needed, for the safety of the consumers during transit. Transportation shall be available to community services, including medical and dental appointments.
- (4.) **Skilled Practitioners:** Specialized staff and consultants shall be available to consumers, families, and agencies to maintain a high quality of care for consumers. These staff shall include speech therapists, occupational therapists, physical therapists, mental health professionals, and experts in medication monitoring and medical and dental care for people with disabilities. These professionals shall provide services for consumers at a conveniently located site or at the consumers' home/program, depending on individual needs. A comprehensive medical review by a panel of professionals shall be available as needed. Innovative approaches such as telemedicine shall be used as appropriate.
- (5.) **Pharmacy:** A pharmacy resource shall be developed at a conveniently-located site that will provide prescribed medications, appropriate packaging of medication, delivery, and consultation.
- (6.) **Augmentive Communication:** Services and supports shall be created for the assessment, development, modification and maintenance of specialized communication devices. Experienced staff shall provide training and monitoring to consumers, families, and support staff that allows consumers to communicate their needs in the most effective manner.
- (7.) **Foster Grandparents/Senior Companions:** Foster Grandparent Senior Companion programs shall be developed for Agnews' residents moving into the community. This program shall be funded by the Department, not the local counties, to ensure continued service and focus on people with developmental disabilities. Funding shall include the costs of coordinating services, stipends, and transportation for the providers.

f. **Transition Services and Supports**

All residential, day, and recreational services and supports shall be securely established before a consumer moves into a setting outside of the Agnews campus. A consumer will have appropriate services in the community while new programs are being established. The transition process shall involve the community staff, which will provide support, spending time with the consumer at Agnews through personal interactions, and training. Agnews' staff, who knows the consumer best, will assist in the transition. The consumer, family members, advocate, and professionals will work collaboratively to provide a transition plan that works best for the individual.

- (1.) **Transition Planning:** Planning for transition shall be done through a person-centered futures planning process facilitated by persons with experience in the process and knowledge of the full variety of community supports, including the most integrated options, and of the capacities of community systems to meet even the most challenging or complex needs. The consumer shall be assisted to participate in the process to the highest degree possible. The consumer's family and friends, Agnews' staff who know the consumer well, and a regional center Service Coordinator shall be part of the process. The planning process shall determine the specific supports and services that are appropriate for the person and that he or she needs and prefers to live in the community, including those needed to promote the individual's community inclusion, independence and growth, health and well being.
- (2.) **Transition Plans between Agnews and Day Services and Supports:** Develop IPPs to transition consumers from Agnews to particular day services and supports. Cross-training between Agnews' staff and the community is critical. The timeframe for the transition will be determined by the IDT that includes the consumer, Agnews' staff, regional center staff, community supports, friends, and family, and will be based on the consumers' needs and preferences. Activities during transition shall occur at Agnews, in the community, or in any logical combination to enable a smooth transition.

g. **Barriers And Resolutions**

(1.) **Funding and Rates:**

Barrier: The rate to fund services in the community is not sufficient to cover the costs for quality support services.

Resolution: *A new rate methodology shall be developed which supports quality programs. This shall include competitive wages and benefits for qualified staff, full funding of operating expenses and the provision of a geographic differential.*

Barrier: Training for support staff is not funded for staff in residential, vocational, and leisure programs on an ongoing basis.

Resolution: *Rates must include costs for orientation and ongoing training of support staff, including the costs of fees for training opportunities, travel, and substitute staff.*

Barrier: There is no geographic differential in funding for programs that operate in areas with a higher cost of living.

Resolution: *A new rate methodology shall be completed in each geographic region to determine appropriate rates for specific regions in which Agnews' consumers will reside.*

Barrier: It is difficult to recruit and retain a qualified stable workforce because there is no difference in funding for staff that has more training, experiences, or expertise with the developmentally disabled population and there is no career track for staff working in the community.

Resolution: *Pilot the implementation of the Personnel Model developed by the Department and the Service Delivery Reform Committee and is contained in the Draft Report to the Service Delivery Reform Committee, May 15, 2001. The rate methodology shall provide funding needed to implement the Personnel Models.*

Barrier: Supplemental Security Income (SSI) money is deducted if a consumer makes minimal money on a job in a community setting. SSI payments are stopped if a consumer has more than \$2,000 in resources.

Resolution: *California legislators shall advocate for flexibility in the regulations for SSI so a consumer can save money for essential needs such as the down payment on an apartment; increases in the amount of money individuals are able to make prior to SSI being reduced, to offer a more reasonable living standard based on current costs.*

Barrier: Although start up funding may exist, ongoing funding of programs may not last.

Resolution: *A group of providers of services and funds shall create a list of possible ongoing funding needs. These needs shall be evaluated prior to a service being approved and provided so all parties understand the potential costs of that service. Ongoing funding requests shall be monitored/reviewed by a team of 'experts.' Decisions shall be made on an individual basis regarding needs and costs. It shall be required that individual consumer budgets and services be reviewed annually by the Department to make sure savings can be tied to the consumer's need for reduction in services and does not cause a reduction in necessary funding in services.*

Barrier: Funds are not available for ongoing home repairs that may be necessitated by the person's disability; e.g., replacement of windows or wall surfaces.

Resolution: *Provide funding for such needs based on the IPP determination of need.*

Barrier: Day programs are funded by a daily rate rather than an hourly rate.

Resolution: *Eliminate the concept of 'program day' in funding mechanisms. Fund day programs by the hour to allow flexibility to what best fits consumer's life.*

Barrier: Residential and ICF facilities lose funding because they do not fill their beds all at one time.

Resolution: *Start up monies shall be available to facilities until all the consumers identified from Agnews move into the home.*

Barrier: Funding is not available for crisis supports to occur in a timely manner.

Resolution: *Fund mobile crisis support teams. Regional centers shall develop clear expectations to determine the need for crisis support. Flexibility in initial documentation of a crisis shall be established by regional centers to allow crisis providers to be funded quickly.*

Barrier: Resources and supports cannot be funded that do not fit a particular vendor code.

Resolution: *Expand miscellaneous codes to include all services necessary for consumers leaving Agnews.*

Barrier: Alternative Residential Model (ARM) rates are not flexible for individual needs.

Resolution: *A modeled rate system shall be piloted taking into consideration the recommendations of the rate system prepared as Part 5 of the service delivery reform effort. In the interim, rates shall be supplemented for costs not included in ARM rates, such as additional staffing and consultant hours.*

Barrier: Supported Living Services agency rates are inadequate and too restrictive to provide quality services.

Resolution: *Ensure that supported living rates shall be adequate to fund competitive wages, benefits, and operating expenses in different geographic areas.*

Barrier: Many consumers moving from Agnews do not have adequate resources to establish a household.

Resolution: *Funding mechanisms shall be developed to enable consumers to move into their own household.*

Barrier: Consumers are prevented from choosing to live in homes of their own because of inadequate monthly income to meet living costs.

Resolution: *The Department shall advocate for more Section 8 housing for consumers and provide interim funding for rental costs until Section 8 housing is available.*

Barrier: There is a shortage of nurses and medically-trained professionals in the community for people with developmental disabilities.

Resolution: *Have nurses available at HUB. Regional centers shall apply per Assembly Bill 637 to pay nurses and other medical personnel competitive rates rather than SMA/Medi-Cal rates.*

(2.) **Community:**

Barrier: Many existing community programs, such as public parks, recreation centers, and job sites in the community, are unwilling or unable to incorporate people with developmental disabilities into their settings.

Resolution: *Regional centers shall have the fiscal and personnel resources to implement the provisions of Welfare and Institutions Code Section 4688 and shall undertake activities to expand opportunities for the full and equal participation of people with developmental disabilities in their local communities, regardless of the socioeconomic level of that community. This will be done through outreach, education, innovative methods of contracting with community members to provide support in natural environments, and the funding of community support facilitators.*

Barrier: There are few available jobs in the Bay Area, limiting the number of jobs available for Agnews' residents.

Resolution: *Regional centers will have the resources to fund job developers and volunteer coordinators who can identify paid and volunteer opportunities in local communities. Partnerships with State and Federal set-aside programs shall be established. Regional centers and service providers shall maximize opportunities for consumers to work in their organizations.*

Barrier: Many existing community programs operate independently, and in isolation of one another.

Resolution: *Regional center Service Coordinators shall facilitate collaboration among all programs serving the consumer to ensure consistent support.*

Barrier: There is a shortage of consumer services: (a) Many current vendors successfully serving former residents of developmental centers have reached capacity and cannot serve additional developmental centers or community residents; (b) There is a shortage of Supported Living agencies, thus limiting the access of consumers to this most individualized and integrated support model; and (c) People moving from Agnews may displace people in the community currently on waiting lists.

Resolution: *Expand the capacity of community services so that the needs of both community consumers and those moving from Agnews can be met. Expansion methods shall include: (a) Current community vendors who have successfully served consumers with intensive needs (these vendors shall be provided with funds for capacity building prior to providing services to additional consumers); (b) Provision of funding and encouragement for providers who are successfully serving consumers with intensive needs to mentor new providers and Supported Living agencies so that they can provide a similar quality service; and (c) Regional centers shall have sufficient resource development capacity.*

Barrier: Vendors are expected to provide natural supports (churches, neighbors, etc.) and they are expected to be accountable to the community (knowing if a person has a criminal background, etc.).

Resolution: *Vendors and regional centers shall create guidelines in partnership with consumers and their circles of supports. Regional centers shall clarify vendor responsibility for consumer interactions with community members. Agencies shall encourage monitoring of relationships, but all involved parties shall recognize the benefits and risks of relationships.*

Barrier: Quality of community services and supports needs to be improved.

Resolution: *Implement the Quality Enhancement, Service Requirements and Performance Measures developed by the Department and the Service Delivery Reform Committee, which is contained in the Draft Report to the Service Delivery Reform Committee, May 15, 2001.*

(3.) **Licensing:**

Barrier: Current Licensing and Certification requirements of both DSS and DHS present many barriers to the provision of innovative and responsive service delivery models. These barriers have been detailed in 'The Findings and Recommendations of the Committee on Governmental Barriers' prepared pursuant to the Coffelt settlement and published in October 1994. The report states that barriers “. . . are primarily the result of different approaches among state departments in how to achieve the goals of the Lanterman Act.” Most of the identified barriers continue unchanged today and the Licensing and Certification section of the report is incorporated herein rather than repeating it in its entirety.

Resolution: *The Findings and Recommendations of the Committee on Governmental Barriers report suggested resolutions and approaches to the identified barriers. These resolutions are incorporated herein. In addition, establish a pilot project allowing the creation of additional models of service delivery outside the domain of licensing agencies with quality monitoring by the Department, as provided for Adult Family Home Agency services (see Welfare and Institutions Code Sections 4689.1 - 4689.6) and/or by regional centers as provided for Supported Living services (see Welfare and Institutions code Section 4689).*

Barrier: There are insufficient licensing models for serving consumers with significant medical involvement who need the presence of nursing staff more than eight hours per day. The pilot waiver for an ICF/DD-CN is too limited (10 homes of which there are only 6 in operation) and the evaluation period is too lengthy. There are insufficient models for individuals with medical needs who also have behavioral challenges.

Resolution: *Create new models of service for consumers with medical and behavioral needs: (a) Complete an evaluation of existing ICF/DD-CN homes within six months. Within the following six months promulgate regulations so that ICF/DD-CN services become a regular service option in California. (b) Expand alternative models similar to LSAs. (c) Develop Supported Living agencies which can meet the needs of medically-fragile consumers; e.g., medical supervision and oversight and direct nursing services for*

consumers. (d) Develop means to access nursing needs in the community, such as Service Hubs.

Barrier: Consumers cannot appeal licensing agency decisions that may deprive them of their current services.

Resolution: *Create a consumer appeal process for licensing.*

(4.) **Outside Agencies:**

Barrier: Local police and fire departments may not be familiar with Agnews' population. Police can't keep a file on people in the community.

Resolution: *Provide regular and ongoing training of local police and fire departments with regional center staff; provide a system to help keep track of consumers who may have frequent contact with police/fire departments. Determine ways to meet consumer's needs while complying with HIPAA (Health Insurance Portability & Accountability Act) regulations.*

Barrier: There are delays by the Department of Justice (DOJ) in fingerprinting and child abuse indexing clearances.

Resolution: *Employ the use of Lifescan machines at HUB and regional centers and assist vendors to apply for their own Lifescan machines.*

Barrier: Child and Adult Protective Services do not provide information on a report while a report is pending.

Resolution: *Create a collaborative working relationship among Adult Protective Services, Child Protective Services, and regional centers to share information during and after the course of an investigation.*

Barrier: In-Home Support Services (IHSS) is a generic resource, but its use creates complexity, potential conflict of interest, and varied and inadequate rates for the same employee which compromises quality services.

Resolution: *Develop a mechanism for Supported Living agencies so that IHSS funding for services can be accessed directly by the vendor. Expand the practice of the County to*

contract directly with regional centers without limiting the amount of IHSS services for the consumer. Detailed recommendations for IHSS funding can also be referenced in The Findings and Recommendations of the Committee on Governmental Barriers prepared pursuant to the Coffelt settlement and published in October 1994.

Barrier: There are insufficient numbers of qualified people available to implement futures planning for all Agnews' consumers in a timely manner.

Resolution: *Increase the number of qualified individuals to facilitate futures planning of Agnews' residents. Utilize existing futures planning resources (PATH, etc.) to train staff in the process. Staff shall receive training in the community options available for Agnews' consumers.*

Barrier: Funding and staffing is inadequate to complete the transition process of relocating Agnews' residents through the futures planning process.

Resolution: *Reduce the caseload size of developmental center liaisons to allow ample transition planning and follow up from Service Coordinators within the first year of placement for Agnews' residents.*

b. **Implementation Plan**

- (1.) Workgroups shall reconvene throughout the process to assist with further design and ongoing implementation.
- (2.) Futures planning shall occur to determine the needs and preferences of the consumers.
- (3.) Timelines shall be created to make sure services and supports are available and operational prior to consumers leaving Agnews.
- (4.) Futures planning and resource development shall occur so that supports are available prior to people moving from Agnews. Individuals shall not transfer from Agnews until services are available for each person.
- (5.) The State shall make a commitment to the preparation necessary to serve the consumers to create quality services.
- (6.) Community input opportunities shall be provided throughout the process.

c. **Values And Guiding Principles**

- (1.) There shall be a person-centered system designed to meet unique needs and preferences of each individual.
- (2.) Planning for transition shall be done through the person-centered futures planning process facilitated by persons with experience and including the consumer, family, and friends; and Agnews and regional center staff.
- (3.) Smaller allows greater individualization. Staff ratios must meet consumer needs.
- (4.) Build/remodel for accessibility, safety, and durability.
- (5.) Consumers/families/advocates shall be given information in a manner they can understand, including experiential information, to make informed choices of desired services.
- (6.) Regular review/analysis of programs shall be performed to improve quality.
- (7.) Support services shall be available for all individuals, regardless of the level of disability, and shall encourage a variety of experiences that allow consumers to participate in the community.
- (8.) There shall be access to paid work that uses previously acquired skills and allows new skills to be learned.
- (9.) Transition to new programs shall not be rushed and shall proceed in a manner which best meets consumer needs and preferences. Knowledge and experience of Agnews' staff shall be used during transition and after placement, as needed.
- (10.) Provide a full range of supports to meet consumer needs and preferences.
- (11.) Support services shall be flexible and evolve based on the changing needs and preferences of the consumers.
- (12.) Provide regular opportunities for Agnews' residents to socialize with one another when they move into the community. Efforts shall be made to maintain friendships and relationships.
- (13.) There shall be an emphasis on community integration and genuine participation of consumers in their communities.

- (14.) Adequate funding shall be available for supports and services based on actual costs for the area where service is provided and shall continue after the start up period.
- (15.) Staff retention depends on salary, benefits, training, and recognition of employee's worth.
- (16.) Funding and staff wages shall be at a level that dissolves the current resource imbalance between community-owned and state-owned service and supports.
- (17.) Consumers moving into the community must have continued access to quality medical and nursing care.

10. **QUALITY ASSURANCE**

The Quality Assurance/Quality Improvement (QA/QI) system has been designed to focus on the people currently residing at Agnews, emphasizing the 'person by person' model as each individual begins his or her transition into a new living arrangement. The focus of this system will be on assuring that quality services and supports are available prior to and during transition.

The new framework of the QA/QI system is based upon the conceptual model that balances compliance monitoring and quality of life outcomes through a new continuous QI system. Utilizing the overall framework of the CMS-HCBS QI framework the QA/QI plan was established with the following elements:

a. **Design**

The design of this project begins with the current QA systems and addresses the system implementation of the Bay Area Project Indicators. These indicators were designed as specific measurement criteria used to evaluate the activities and successes of this project.

b. **Discovery**

Discovery activities will includes those activities, and the data collected, from current QA activities and the QA Team activities. Use of standardized monitoring tools will allow for consistent implementation in monitoring services as well as a means of identifying concerns and opportunities for improvement.

c. **Remediation**

The process of data review and analysis will assist in identifying the level of action needed to resolve any issue that is raised during the discovery

phase. These actions may be incumbent upon the regional center for action, the service provider for action, and/or a department-wide response to systemic issues. In areas related to noncompliance, regulations currently dictate those actions that can be taken based upon the circumstances involved.

d. **Continuous Improvement**

The overall design of this system provides for a “regional” view of services being delivered and each consumer’s response to those services. Reporting mechanisms include data analysis and findings reported directly to the Bay Area Project Steering Committee as well as immediate reporting back to the involved regional center and Service Coordinator for prompt actions. This reporting process ensures all involved parties are informed, appropriate actions are assigned to the responsible individual(s), and follow up monitoring to ensure compliance is addressed.

e. **Bay Area Project Quality Assurance Advisory Committee**

(1.) The primary focus of the Bay Area Project Quality Assurance Advisory Committee (BAPQAA) will be to serve as an additional level of monitoring and oversight at the regional level. This committee will offer a broader evaluation/determination as to whether consumers are served as agreed-upon prior to transition and will assist in identifying whether people continue to receive services that meet their needs. An additional mechanism obtained will be the identification of patterns or trends in relation to problem areas within the service delivery system. Review of data and information provided will allow the Bay Area Project Steering Committee and the Department to evaluate areas of need and develop resources to meet those needs.

(2.) Membership on the BAPQAA Committee would include representatives from the following:

- (a.) Consumers;
- (b.) Family Members;
- (c.) Advocacy Organizations;
- (d.) Service Providers;
- (e.) Involved Regional Centers; and
- (f.) Agnews.

- (3.) Specific responsibilities of the BAPQAA Committee include:
 - (a.) Review of transition activities for all persons leaving Agnews.
 - (b.) Review of specific data collected from each regional center QA department in areas identified by the committee such as trends for individual consumers, individual providers, and larger system implications.
 - (c.) Reporting responsibility and provision of recommendations to the Bay Area Project Steering Committee.
 - (d.) Serve in an advisory capacity to the Bay Area Project QA team to assure monitoring activities are conducted as required.

f. **Bay Area Project Quality Assurance Team**

The Bay Area Project QA team will be designated as the primary source of data collection and information in relation to the HCBS indicators identified as a part of this process. Membership on the team will include staff with an expertise and experience in collection, compilation, and analysis of QA data. In addition, this team will be responsible for assuring that the ongoing monitoring activities, as identified in this plan, occur as indicated. A final responsibility of this team will be to complete audits and/or reviews that might be recommended by the Bay Area Project Steering Committee and/or the BAPQAA Committee.

g. **Bay Area Project Indicators**

Currently, the HCBS framework for QI incorporates seven focus areas for review. While there is no expectation that all areas be evaluated, this system allows for regular monitoring of six of those focus areas. In developing these areas the Bay Area Project Committee took into consideration those expectations currently in place, either by regulation, statute, and/or by the Department and then determined standards that must be met for each individual leaving Agnews. These standards resulted in the Bay Area Project Indicators that are referenced throughout this document and highlight what is believed to be critical areas of monitoring over the coming months/years.

h. **Current QA Systems In Place**

In conjunction with the BAPQAA Committee, this system builds upon the existing QA and QI structure including findings of the following regulatory and monitoring entities:

(1.) **Regulatory Agency Activities**

- (a.) DHS/Licensing & Certification;
- (b.) Community Care Licensing;
- (c.) Local Law Enforcement;
- (d.) Adult Protective Services, Child Protective Services & Ombudsman.

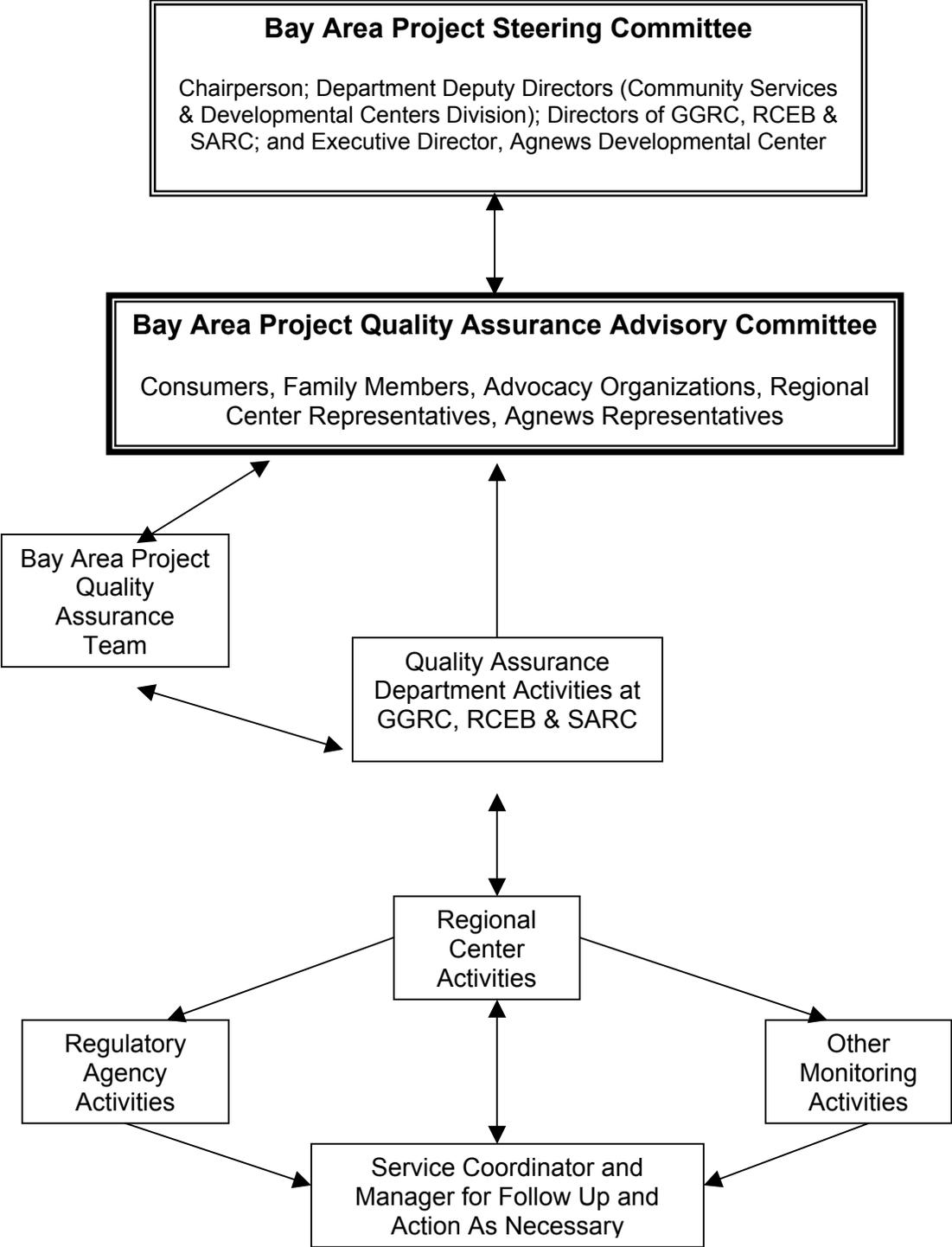
(2.) **Regional Center Activities**

- (a.) QA Evaluations;
- (b.) Facility Liaison Monitoring;
- (c.) Service Coordinator Monitoring;
- (d.) Risk Management System.

(3.) **Other Monitoring Activities**

- (a.) Life Quality Assessments;
- (b.) Special Incident Reporting System.

i. **Information Flow Chart**



j. **Recommendations**

- (1.) **HCBS Framework Indicators:** An important element evaluate the services and supports provided and each individual consumer response “one person at a time.” A mechanism designed to support this activity is the use of the HCBS framework indicators. The QA workgroup sees these indicators as areas of priority, and/or those continued areas of need within the service delivery system, that will measure how successful the transition into community services has been for each individual involved. While it is recognized that the specific indicators being recommended are not all inclusive of a person’s service needs, it is believed that these indicators, paired up with the additional monitoring that occurs within the LQA, Service Coordination, QA evaluations and liaison visits will offer a more inclusive look at how successful a person is transitioning from the developmental center.
- (2.) **Uniform QA System:** A uniform system of Quality Assurance should be adopted by the three regional centers. This system would be based upon a common set of policies, operational guidelines and practices including standardized instrumentation and review protocols. This system would incorporate the functions of oversight, monitoring and technical assistance for service providers. This would also standardize all procedures related to consumer protection including risk management and special incident processes.
- (3.) **Risk Management:** The Risk Management system within each regional center should establish a core set of expectations that allows for routine monitoring, follow up, and proactive measures to assure people are safe and free from harm. This system should include a uniform set of policies and operational procedures that includes internal processes for incident reporting, oversight of data, consumers and providers. It will be important to this system to assure there is a ‘core’ contact person at each regional center to assure immediate and appropriate response to untoward events experienced by consumers leaving Agnews and that there is some mechanism for independent review of incidents such as the “Incident Action Team.”

- (4.) **Nursing Assessment and Oversight:** An essential component of the QA/QI system will be to increase the availability of nursing services and supports to consumers moving into the community. As the population at Agnews and in the community continues to age, the availability of medical and nursing services and supports will be essential. For many people residing at Agnews their continued health status has occurred as a result of careful monitoring and nursing oversight. As people move into community services, that do not have immediate access to nursing supports, it will be important that this is available as needed. Additionally, for those persons with significant medical and nursing conditions, the availability of nursing oversight will mean the difference in their continued health and success.
- (5.) **Access to Information/Confidentiality:** The QA/QI system has been designed to provide an extensive measure of monitoring to people leaving Agnews who may be moving into community services. As this system requires access to consumers, family members, information within the IPP and ISP, it will be important that the recommended QA team members are allowed access to this information. Currently, regional centers are granted authority over a multitude of data; e.g., incident reports, unannounced provider data and visits, etc., that allow this oversight to occur. Within the design of the QA/QI system this same level of access would need to be granted to the members of the BAPQAA Committee and the BAP QA team to assure monitoring occurs.
- (6.) **Consumer Outcomes and Satisfaction:** In an effort to obtain data on consumer outcomes and satisfaction that are valid, reliable, and measurable, exploration of various tools and assessment methodologies should be conducted. Instruments to be researched and considered for pilot demonstration within the Bay Area Project include the following:
- (a.) National Core Indicators (HSRI);
 - (b.) Participant Evaluation Survey (CMS);
 - (c.) Personal Outcome Measures (Council on Quality and Leadership).

The use of one of these outcome and satisfaction measurement systems would not supplant the use, review and analysis of data gleaned from the Life Quality Assessments mandated within the Lanterman Act.

- (7.) **Service Coordination:** The role of the Service Coordinator is critical to monitoring and implementing services provided to consumers. In many cases the Service Coordinator is the primary contact person for the consumer. As people transition out of Agnews, it will be essential to expand the role of the Service Coordinator, expand the expectations and knowledge base of each Service Coordinator, and provide the support and assistance they may need carrying out this function. For people leaving Agnews, the Service Coordinator caseload assignments should be reduced/limited to allow for ongoing visits and coordination of activities to adequately assist in accessing the necessary supports and services.
- (8.) **Transition Planning:** The transition process for consumers, and state staff alike, will be a critical component to the success of services offered. It is recommended that staff training include exercise of rights, empowerment of consumers, use of generic resources, and adaptation of roles in community settings.
- (9.) **Evaluate The Current IPP Process:** A regional committee of representatives from all involved stakeholders should be established to evaluate and enhance the current IPP process in use in community services to assure important aspects of a person's life—such as health care planning, risk assessment, etc.—are documented within the consumer's plan. The IPP process currently supports a primary focus on person-centered planning, incorporating what a consumer may want, need, and desire as steps towards planning over the coming years. Certain elements of a consumer's life, such as critical aspects of keeping a person healthy or safe, may not always be directly tied into some "person-centered" plans. A second component to improving the IPP process will be to increase access to clinical and assessment information to assist in IPP planning and development.

- (10.) **Crisis Intervention Services:** Crisis intervention services should be expanded to ensure timely and sufficient response to extreme situations where consumer's health, safety, and placement are threatened. Both on-site and off-site resources should be available for vendor support in addressing unpredictable and dangerous situations. These resources may include temporary, alternative housing and intervention programs while individual plans for services and supports are modified. These crisis intervention services should be designed as alternatives to more intrusive and disruptive measures such as involuntary psychiatric admission or re-admission to a large congregate developmental services facility.
- (11.) **Self Advocacy Training Program:** An essential element of assisting Agnews' consumers to develop and succeed in the community will be to provide support, assistance, and training, where needed, in areas of self-advocacy. Many consumers could benefit from having increased opportunities in making decisions regarding simple and complex aspects of daily life. An array of options—including individual training in self-advocacy, participation in self-advocacy groups and/or self-government activities, Volunteer Advocacy Project and/or Clients' Rights Advocacy—would support efforts in this regard. It will be important that each regional center take an active and involved role in developing consumer leadership amongst their stakeholders.
- (12.) **Rate Structure:** The established rate structure will need to be revised in order to enhance and expand services to consumers moving out of the Agnews. The current rate structure does not provide for adequate funding for services, particularly direct support professional salaries and benefits. Any future legislation and policies, regarding new community services for people moving from Agnews, must address this issue.
- (13.) **Direct Support Professional (DSP) Training:** In establishing standards of practice for service providers it is recommended that we expand the Direct Support Professional (DSP) training in an effort to assure staff competency. This training should incorporate a 'competency based' approach in which staff competency is assessed as a regular part of training. This would require an increase in the number of classes or opportunities for training based upon regional and local needs. Training provided should

include risk management elements such as conducting investigations, asking questions, implementing plans of protection, and completing the necessary follow up to assure a timely response. In addition, the training should incorporate rights as an element of prospective provider orientation and training that is required for all new providers. One mechanism for rewarding competency could be in attaching this level of competency to the wages and salary system.

- (14.) **Standards of Practice in Service Provider Expectations:** The development of Standards of Practice for Service Providers will offer a more concrete mechanism for assuring that quality services are provided. In addition, these standards will assure good communication between service providers and regional centers; build a stronger relationship, and assure implementation is consistent and equitable. In order to make these standards successful, it will be important to implement throughout the three regional center areas and to include, but not be limited to:
- (a.) Mandatory ISP development in all service provider environments.
 - (b.) Develop uniform requirements for medication management that expands expectations of service providers and documentation.
 - (c.) Establish a Memorandum of Understanding (MOU) with residential providers. For implementation of additional service standards over and above regulatory requirements.
 - (d.) Standardize the grievance procedure to assure consistent implementation and compliance with the requirements of the fair hearing procedure for regional centers and developmental centers.
 - (e.) Establish standard training curriculum for provider staff.
 - (f.) Required self-assessment programs for providers to assure programs are assisting consumers in meeting personal goals.
- (15.) **Vendorization:** Regional centers need greater authority to establish more stringent standards for potential providers in order to meet vendorization requirements. Denial of vendorization needs to be expanded to include providers' fiscal viability, ability to show

competency in specific areas related to the service requested, and background information of an unfavorable nature; i.e., billing practices such as misrepresentation.

k. **Implementation Plans**

Goal 1. Establish BAPQAA Committee.

- (a.) Identify/solicit membership for committee participation.
- (b.) Establish guidelines for committee activities, orientation to role, overview responsibilities, and reporting mechanisms.
- (c.) Determine activities to be reviewed by BAPQAA Committee.
- (d.) Establish reporting mechanism for data oversight.
- (e.) Provide for short, mid-, and long-range role and function of the BAPQAA Committee.

Goal 2. Design Bay Area Project QA Process.

- (a.) Identify membership and roles for QA team participation.
- (b.) Complete a review, revision and approval for use of HCBS Indicators.
- (c.) Develop and implement a process that requires:
 - (1.) Monitoring review to be completed by team members utilizing monitoring tools that assure all aspects of the individual's life has been maintained or improved.
 - (2.) Monitoring completed at least monthly for first 90 days and quarterly thereafter, or more frequently as specified in the IPP.
 - (3.) Monitoring to include face-to-face visits with individual, family, and/or conservator to ascertain satisfaction as well as face-to-face visits to the living arrangement and day program to monitor services and supports through observation and documentation.
 - (4.) Additional contacts and additional consulting staff as needed to observe services and supports and review documentation of services and supports.

- (d.) Components for QA process review include:
 - (1.) Evaluation of the IPP process to assure planning occurs that meets the desires, preferences, and specific needs of each individual.
 - (2.) Implementation of a standardized mechanism for assuring positive outcomes for consumers served.
 - (3.) Use of standardized monitoring tools in areas recommended through framework indicators.
 - (e.) Establish timelines for data collection and reporting.
- Goal 3. Review Role of Service Coordinators for People Leaving Agnews.
- (a.) Identify team to establish requirements for regional center staff assigned to coordinate supports and services.
 - (b.) Establish protocols for the Service Coordinator to follow through on incident reports and nursing level reviews.
 - (c.) Provide ongoing training and support to Service Coordinators.
 - (d.) Establish monitoring system for Service Coordinator requirements that ensure timely and responsive intervention on behalf of the consumer.
- Goal 4. Design a system that allows for established nursing assessment and oversight to assure individuals' health/medical needs are properly addressed.
- (a.) Establish a set of minimum expectations for nursing/health care oversight based upon individual needs.
 - (b.) Evaluate availability of current community nursing services.
 - (c.) Evaluate options for the provision of nursing review/oversight.

I. **Guiding Principles**

The Quality Assurance Workgroup envisions a QA system that ensures and promotes the following:

- (1.) Flexible, creative, individually-tailored services and supports developed through a person-centered planning process.
- (2.) Living arrangements and other services and supports developed based upon individual's needs and desires.
- (3.) People are supported to exercise control over their own lives in decisions big and small.
- (4.) Providers, regional centers, and the Department are held accountable for quality services and continuous improvement.
- (5.) The provision and monitoring of Quality is everyone's responsibility including the individual, families, Service Coordinators, direct support staff, and the community at large.
- (6.) Services and supports are responsive to and change based upon individual satisfaction.
- (7.) Provision and evaluation of services and supports based upon life quality outcomes.
- (8.) Monitoring and evaluation that is equitable and fair with clear performance expectations communicated to all parties.
- (9.) Expanded resource and provider ability, accessibility, and availability.
- (10.) Simplicity—easy to understand, implement and access.
- (11.) Risk identification and implementation of individual and systemic safeguards.
- (12.) Create a systemwide culture of continuous quality improvement based upon partnerships and mutual supports.
- (13.) Systemwide training and technical support.
- (14.) Independent review that looks at what is working and not working in people's lives.

11. **SUMMARY**

The Community Development Team began this process in mid-March of 2003. The process began as an opportunity to develop a plan for the transition of consumers from Agnews into their local communities. Throughout the next six months the process evolved into an opportunity of brainstorming, gathering of ideas, problem-solving, and a sharing of expertise amongst consumers, families, providers (community and developmental center), regional centers, and experts in their respective fields.

In addition to the workgroup efforts, each of the chairpersons were involved in regular and routine sessions of information sharing amongst each other. This provided the necessary direction and assistance back to the workgroups for further plan development. From this extensive, and very positive collaborative effort came the summary of information provided in this report.

This report is based upon the very diverse and comprehensive written reports provided from each workgroup. The CD Team feels that with implementation and oversight, not only will the men and women residing at Agnews receive the necessary services and supports required, but also the level and expertise of services in the community will be expanded to all consumers served within the Bay Area Project.

ATTACHMENT 1A

	Community Dev Team	Housing Dev Workgroup	Service Hubs Workgroup	Support Services Workgroup	QA Workgroup	TOTAL #
Consumers	3	2	0	2	0	7
Agnews' Parents	3	1	1	3	0	8
Parent Organizations and Involved Parents	6	4	1	1	1	13
Agnews' Staff	2	1	5	2	2	12
Regional Center Staff	5	3	3	5	5	21
Department Staff	4	1	2	1	1	9
Private Providers	5	13	0	6	0	24
Area Board Staff	3	1	0	2	2	8
Advocacy Org Representatives	2	0	0	1	2	5
Legislative Representatives	2	0	0	0	0	2
Consultants and Others	0	1	0	0	0	1
	35	27	12	23	13	

ATTACHMENT 1B
COMMUNITY DEVELOPMENT TEAM

MEMBER	ORGANIZATION/AFFILIATION
Santi J. Rogers Chairperson	Executive Director San Andreas Regional Center
Carol Bohnsack	Chief, Community Services Golden Gate Regional Center
John Boisa	Consultant Assembly Committee on Human Services
La Donna Bray	Parent
Ed Carraway	Porterville Parent Group
Mary Jane Casper	Field Representative Office of Senator Liz Figueroa
Denis Craig	Community Program Manager Area Board V
Bob Cross	Agnews Governor's Advisory Board
Francine Davis	Director, Community Services Division Regional Center of the East Bay
Shelton Dent	Manager, Community Residential Services Department of Developmental Services
Patricia Flannery	Team Support Agnews Developmental Center
Lara Gelber	Consumer
Ellen Goldblatt	Senior Attorney Protection and Advocacy, Inc.
Melinda Gonser	Staff Support to Bay Area Project Department of Developmental Services
Virginia Grant	Executive Director Area Board VII
Kathy Guinasso	Agnews Parent CASH-PCR
Judy Haller-Martinez	Parent
Mike Keeley	Manager San Andreas Regional Center
Nancy Lopez	Parent
Sunny Maden	CASH-PCR
Kris McCann	Housing Consultant Executive Director - Bay Area Housing Corporation

MEMBER	ORGANIZATION/AFFILIATION
Peter Mendoza	State Council on DD
Lisa Merlin	Executive Director Housing Choices Coalition
Charles "Mick" Morgan	Area Board VII Member Parent
Julia Mullen	Manager, Community Development Department of Developmental Services
Bud O'Hare	Agnews Parent AMRA
Stan Parry	Housing Choices Coalition
Harold Pitchford	Executive Director Agnews Developmental Center
Mark W. Polit Executive Director	CA Alliance for Inclusive Community Parent
Laura Repke	The Arc San Francisco
Tony Schrick	Regional Projects, Secure Treatment, & Education Department of Developmental Services
Lavelle Souza	Parent
Walter Welch	Consumer
Alan Wilens	Supervisor/Resource Developer Golden Gate Regional Center
Eric Zigman	Chair SARC Provider Advisory Committee

ATTACHMENT 1C
HOUSING DEVELOPMENT WORKGROUP

MEMBER	ORGANIZATION/AFFILIATION
Johnny Anguiano	Parca Housing Project Manager
Scott Beesley	Housing Choices Coalition Housing Catalyst
Barry Benda	Resource Developer Golden Gate Regional Center
Jamie Blackson Baker	Executive Director Housing Consortium of the East Bay
Chris Block	Executive Director Charities Housing
George Braddock	Creative Housing
Ed Carraway	Porterville Parent Group
Tracey Chew	Associate Executive Director Bay Area Housing Corporation
Dave Coury	Housing Specialist Lifeshouse Agency
Denis Craig	Community Program Manager Area Board V
Sara Desumala	Consumer People First of California
William Dycus	Consumer – People First of California Board of RCEB
Patricia Flannery	Team Support Agnews Developmental Center
Paulette Grilli	Grilli and Associates (Consultant)
Kathy Guinasso	Agnews Parent CASH-PCR
Jessie Hall	Barry Swenson Builder Project Manager
Steve Johnson	Governor's Advisory Board
Nancy Lopez	Parent
Kris McCann (Chairperson)	Housing Consultant Executive Director Bay Area Housing Corporation
Clare McDermott	Parent, MFCC Chair BAHC
Lisa Merlin	Executive Director Housing Choices Coalition

MEMBER	ORGANIZATION/AFFILIATION
Julia Mullen	Manager, Community Development Branch Department of Developmental Services
Keith Nakatani	Housing Resource Developer The Arc San Francisco
Laura Repke	The Arc San Francisco
Kathy Robinson	Developer Charities Housing
John Rodriguez	Director of Older Adult Services Regional Center of the East Bay
Santi J. Rogers	Executive Director San Andreas Regional Center

ATTACHMENT 1D
SERVICE HUBS WORKGROUP

MEMBER	ORGANIZATION/AFFILIATION
Veronica Arimboanga	Residence Manager Agnews Developmental Center
Carol Bohnsack	Chief, Community Services Golden Gate Regional Center
Chris Castelli	Director Regional Project of the Bay Area
Shelton Dent	Manager, Community Residential Services Department of Developmental Services
Patricia Flannery	Team Support Agnews Developmental Center
Ed Goodnight	Program Assistant Agnews Developmental Center
Judy Haller-Martinez	Parent
Sheryl Kuhn	Director of Consumer Services Regional Center of the East Bay
Sunny Maden	CASH-PCR
Harold Pitchford (Chairperson)	Executive Director Agnews Developmental Center
Tony Schrick	Department of Developmental Services
Lisa Wendt, RN	Nurse Consultant San Andreas Regional Center

ATTACHMENT 1E
SUPPORT SERVICES WORKGROUP

MEMBER	ORGANIZATION/AFFILIATION
La Donna Bray	Parent AMRA
Denis Craig	Area Board V Community Program Manager
Sara Desumala	Consumer – People First
Kim Dodd	Trinity CHANGE, Inc. Supported Living Executive Director/Parent
William Dycus	Consumer – People First Board of RCEB
Patricia Flannery	Team Support Agnews Developmental Center
Ellen Goldblatt	Senior Attorney Protection and Advocacy, Inc.
Kathy Guinasso	Agnews Parent CASH-PCR
Marva Hamilton	Community Residential Services Department of Developmental Services
Mike Keeley (Co-Chairperson)	Manager San Andreas Regional Center
Jennifer Lucas	Area Board VII Volunteer Advocacy Services Coordinator
Arek Nathanson	Senior Resource Specialist Regional Center of the East Bay
Shannon Odam	Director, Community Living Services HOPE Services
Bud O'Hare	Agnews Parent AMRA
Andrew Pereira	Mainstream SLS
Julie Rienhardt	Executive Director Imagine SLS
John Rodriguez	Director of Older Adult Services Regional Center of the East Bay
Lavelle Souza	Parent
Mary Ortega/Matthew Timbo	Associate Executive Director, The ARC Community Living Services Program
Alan Wilens (Co-Chairperson)	Supervisor/Resource Developer Golden Gate Regional Center
Florence N. Yalung, MA	District Manager, Resource Department San Andreas Regional Center
Reuben Zarate	Agnews Developmental Center Regional Project of the East Bay
Eric Zigman	Chair - SARC Provider Advisory Committee

ATTACHMENT 1F
QUALITY ASSURANCE WORKGROUP

MEMBER	ORGANIZATION/AFFILIATION
Margaret Anderson	Chief, Training and QA Section Department of Developmental Services
Bob Cross	Parent Agnews Governor's Advisory Board
Francine Davis (Co-Chair)	Director, Community Services Division Regional Center of the East Bay
Patricia Flannery	Team Support Agnews Developmental Center
Virginia Grant	Executive Director Area Board VII
Gail Gresham	Protection and Advocacy, Inc.
Lisa Kleinbub, RN	Regional Center of the East Bay Director of Health & Behavioral Services
Charles "Mick" Morgan	Parent Area Board VII Member
Barbara Peschka, RN	Quality Assurance Nurse San Andreas Regional Center
Mark W. Polit	Parent CA Alliance for Inclusive Community
Helen Raschke	Quality Assurance Supervisor Golden Gate Regional Center
Tamara Rodriguez	Standards Compliance Coordinator Agnews Developmental Center
Ron Willsey (Co-Chair)	Associate Executive Director San Andreas Regional Center

ATTACHMENT 1G
SERVICE HUBS FORUM

MEMBER	AGNEWS DEVELOPMENTAL CENTER
Harold Pitchford (Chairperson)	Executive Director
Ed Goodnight	Program 1 Assistant
Veronica Arimboanga	Program 1 Residence Manager
Rosey Rubino	EESP Residence Manager
Guy Nuzum	Quality Assurance IPC
Doriann Shreve	Quality Assurance IPC
Rick Kirske	Pharmacy Manager
Leticia Crislogo-Cabrera	Assistant Director of Dietetics
Betty Henderson	Quality Assurance AGPA
Ken Rubino	Chief of Plant Operations I
Patricia Flannery	Program Director

ATTACHMENT 2

HANDOUTS/RESOURCE DOCUMENTS
Bay Area Housing Corporation
HCBS Quality Framework
Final Outcomes of 3 yr CA Quality Tracking Project - Conroy Report
Putting the Pieces Together—Department of Developmental Services, Quality Management
RCEB QA packet
SARC QA packet
Looking at Service Quality
Oregon Housing and Community Services
The Financing of Housing for People with DD
Planning and Achieving Person-Centered Environments for People w/DD
Life Services Alternatives, Inc
Creative Housing Solutions, LLC
Crisis Homes Listing
Redwood Place
Residential and Educational Services of the East Bay
Alphabetical List of Abbreviations
Licensing Classifications of Residential Settings
Mortality of Californians w/DD After Transfer Into Community Care

HANDOUTS/RESOURCE DOCUMENTS
Employment Opportunities at Agnews
Coastal Post Online – Howard Thornton, MD
Support Services Data from Agnews
QA and QI in HCBS
Welfare and Institutions Code Section on Developmental Center Closure
Agnews Closure Planning Organization Chart
Plan to Close Camarillo State Hospital/Developmental Center
“New Beginnings” Newsletter– Volume 1 Issue 2; Issue 3, and Issue 4
Developmental Center Options Study Final Report
Options to Meet Future Needs of Consumers in Developmental Centers
Consumers Futures Planning Data Grid and Sample Data Printout
ICF – DD CN Pilot Program Handout
Community Options INC – FHA
CCR – Family Home Agency
Adult Family Home Agency Guide—Department of Developmental Services
Mental Health Matrix
Central Valley Crisis House
Options Report – Desert Homes Summary

ATTACHMENT 3

CONSULTANTS/PRESENTERS	
Regional Center Panel of:	<ul style="list-style-type: none"> ▪ Quality Assurance Staff ▪ Developmental Center Liaisons
Service Providers Representing:	<ul style="list-style-type: none"> ▪ Supported Living
	<ul style="list-style-type: none"> ▪ Residential Care
	<ul style="list-style-type: none"> ▪ Day Programs
	<ul style="list-style-type: none"> ▪ Specialist Services
	<ul style="list-style-type: none"> ▪ Local Law Enforcement
Expert Consultants:	<ul style="list-style-type: none"> ▪ George Braddock and John Rowell (Housing Consultants)
	<ul style="list-style-type: none"> ▪ Matt Steinle (Financing Consultant)
	<ul style="list-style-type: none"> ▪ Bay Area Economics
	<ul style="list-style-type: none"> ▪ Bob Rossi (Consultant on Building Community)
Discussion Panels Including:	<ul style="list-style-type: none"> ▪ Agnews' Consumers and Parents
	<ul style="list-style-type: none"> ▪ Former DC Parents and Consumers Panel
	<ul style="list-style-type: none"> ▪ Agnews' Staff Representing Each Clinical Program/Department
Tours Conducted:	<ul style="list-style-type: none"> ▪ All Agnews' Services
	<ul style="list-style-type: none"> ▪ Life Services Alternatives, Inc.
	<ul style="list-style-type: none"> ▪ Local ICF (DDH, DDN and Super N)
	<ul style="list-style-type: none"> ▪ Local ICF/Day Program Tour