**California State Rehabilitation Council (SRC) Quarterly Meeting**

September 11 – 12, 2024, 9:00 a.m. – 4:00 p.m. both days

Meeting location: Department of Rehabilitation (DOR), 721 Capitol Mall, Room 301, Sacramento, CA 95814

*Draft Meeting Minutes*

# Attendance

SRC members (in-person): Ivan Guillen, Brittany Comegna, Theresa Comstock, Shannon Coe, Eli Gelardin.

SRC members (by Zoom): Chanel Brisbane, La Trena Robinson, Yuki Nagasawa, Hilary Lentini, Gregory Meza.

SRC members absent: Jonathan Hasak

DOR staff (in-person): Kate Bjerke, Jessica Grove, Kim Rutledge, Joe Xavier, Jake Johnson, Mark Erlichman, Diane Shinstock.

DOR staff (by Zoom): Cory Lemings, Yukiko Long, Sue Pelbath, Trung Le, Megan Davis, Peter Frangel, Nancy Wentling, Luis Lewis, Julia Ma, Judy Gonzalez, Regina Cademarti, Maria Aliferis-Gjerde.

Members of the public (by Zoom): Kenneth Brooks, Christopher Waltrous, Joyce Nagel, Danny Marquez, Taylor Winchell, Carrie England.

# WEDNESDAY, SEPTEMBER 11, 2024

# Item 1: Welcome and Introductions

Ivan Guillen, SRC Chair, welcomed members and guests to the meeting. Kate Bjerke, SRC Executive Officer, reviewed the Bagley-Keene Open Meeting Act requirements. SRC members introduced themselves.

# Item 2: Public Comment

Kenneth Brooks inquired about the number of DOR consumers pursuing business and entrepreneurship opportunities and success rates.

# Item 3: Approval of the July 17-18, 2024 SRC Quarterly Meeting Minutes

It was moved/seconded (Comstock/Brisbane) to approve the July 17-18, 2024 SRC quarterly meeting minutes with the following edit: top of page 9, under the Santa Barbara Adopt-a-Region report, remove the extra words “and Justin.” (Yes – Guillen, Comegna, Comstock, Coe, Brisbane, Robinson, Meza), (No – 0), (Abstain – 0), (Absent for vote: Gelardin, Hasak, Lentini).

# Item 4: Self-Employment Options for DOR Consumers

DOR representatives Cory Lemings, Yukiko Long, Sue Pelbath, and Trung Le shared about self-employment options and resources available to DOR consumers. A PowerPoint Presentation was shared and covered the following topics: definition of self-employment, overview of what DOR can and cannot provide, informed choice, roles and responsibilities, the Individualized Plan for Employment (IPE), determining when a self-employment setting is appropriate, assessing the self-employment setting and the proposed small business, the scope of services provided for the self-employment setting, and monitoring the operations of the small business (reference [appendix A](#_Appendix_A_-) for the full presentation).

SRC member questions and comments:

* Clarification if DOR can assist individuals with expanding existing businesses. DOR staff confirmed that DOR can provide retention services, which are different than self-employment services.
* It was confirmed that DOR and the consumer are the decision makers in the self-employment process. The Business Consultant provides advice but is not a decision maker.
* SRC member Brittany Comegna spoke about her personal experience as a DOR consumer pursuing a self-employment plan.
* An update was provided on the Business Enterprise Program.

Public comment: Kenneth Brooks asked about obtaining information on the number of DOR consumers who identified self-employment as their employment goal and the success rate. He also asked how the feasibility of a self-employment plan is determined.

SRC members agreed that a follow-up session regarding self-employment will be needed at a future meeting.

# Item 5: Student and Consumer Information Handbook

Megan Davis, Chief, and Peter Frangel, Manager, DOR Policy & Performance Section, spoke about updates being made to DOR’s Student and Consumer Information Handbook. Information included the federal regulatory requirements for content, the “North Star” for the revised handbook, the table of content topics, highlights of the updated content, and next steps for finalizing the handbook (reference [appendix B](#_Appendix_B_–) for the full presentation). Questions and comments included the following:

* Confirmation that the revised handbook is in the review process at DOR, and a finalized version will be ready soon.
* Suggestion that Independent Living Centers and Parent Training and Information Centers be listed as a resource in the handbook.
* Confirmation that the handbook is updated as needed when there are regulation changes.
* Information about providing the handbook in different languages was provided.
* Suggestion to have an ASL version of the handbook done by a certified and qualified interpreter.
* Suggestion to include the contact information for the DOR Ombudsperson in the handbook

Public comment: none.

# Item 6: Presentation of the 2023/24 Consumer Satisfaction Survey Results

Luis Lewis, Manager, and Research Analysts Julia Ma and Judy Gonzalez, with DOR’s Strategic Initiatives Office, presented the results of the 2023/24 Consumer Satisfaction Survey (CSS). Information included CSS methodology and background, results, respondent characteristics, highest and lowest satisfaction scores, unemployment reasons, and trends (reference [appendix C](#_Appendix_C_–) for the full presentation).

SRC member questions and comments:

* Consumer satisfaction with the following two questions is low and is concerning. There is a need to revisit this data.
  + *My counselor treats me with courtesy and respect.*
  + *My service providers treat me with courtesy and respect.*
* There is a need to consider the various ways different cultures and communities respond to surveys. High context and low context cultures, direct meaning vs implied meaning, qualitative vs quantitative questions, listening sessions vs written surveys.
* An issue identified by consumers in the survey are concerns with counselors and service providers. Could this be due to staffing shortages? How can the survey be used to improve satisfaction with service provision? DOR staff confirmed that the survey results are shared with the DOR executive team to analyze how services can be improved.
* It was asked if implementing an Order of Selection would be appropriate given staffing shortages.

Public comment: Christopher Waltrous asked how many Veterans completed the survey, and if there were significant differences in reporting between Veterans and non-Veterans?

# Item 7: Directorate Report

The Directorate’s report began with Joe Xavier, DOR Director, administering the Oath of Office to new SRC members Shannon Coe, Gregory Meza and Eli Gelardin. Director Xavier congratulated SRC members Ivan Guillen, La Trena Robinson and Yuki Nagasawa on being reappointed. Director Xavier thanked former SRC members Susan Henderson, Candice Welch, and Elizabeth Lewis for their service. Director Xavier acknowledged SRC member Hilary Lentini for being an effective liaison and sharing SRC and DOR information and updates with the California Workforce Development board. The following recent and upcoming events/observances were acknowledged:

* September: Suicide Prevention Awareness Month, Deaf Awareness Month, Deaf Awareness Week
* September 11: Patriot Day
* September 16: California Memorial Project - commemorating those who died in state hospitals
* September 27: California Native American Day

Federal update: No additional news or updates at this time on the reauthorization of the Workforce Innovation and Opportunity Act.

State updates:

* A lot of progress at the State level has been made with policy; now the focus is on implementation at the local levels and maximizing the available resources.
* A recent budget letter has called for savings through the reduction of approximately 10,000 vacant state workforce positions. This reduction will be made permanent. The impact to DOR may be approximately 68 positions. The 2025/26 budget also calls for a 7.95% general fund reduction for the entire state. There is an opportunity to request exclusions.
* Dr. Mark Ghaly, California Health and Human Services Agency (CalHHS) Secretary is transitioning from his position at the end of September 2024. Kim Johnson, California Department of Social Services Director, was appointed to serve as the new CalHHS Secretary effective October 1, 2024. Updates on additional CalHHS and Department leadership transitions were highlighted.

Kim Rutledge, Deputy Director, DOR Office of Legislation and Communications, and acting Chief Deputy Director, shared the following Department updates:

* October is National Disability Employment Awareness Month (NDEAM). DOR will celebrate NDEAM with a social media campaign along with virtual and in-person events.
* DOR provided letters of support to several entities that recently applied for federal Disability Innovation Fund grants.
* DOR received $29.3 million in federal vocational rehabilitation funds.
* DOR has doubled the number of individuals receiving Student Services, now serving 50,000 individuals. DOR is increasing capacity to serve more students by partnering with other entities, like the Office of Youth and Community Restoration.
* DOR leadership position updates:
  + Candis Welch was appointed as DOR’s new Chief Equity Officer
  + Lu Saephanh, was appointed as DOR’s new Assistant Deputy Director, Administrative Services Division
  + Retirement of Lisa Niegel, DOR Chief Counsel

Mark Erlichman, Deputy Director, VR Employment Division, shared information on DOR’s Pathway to Success Program, California Subminimum Wage to Competitive Integrated Employment Project (CSP), and an agreement between DOR and the California Labor and Workforce Development Agency to support workforce systems and policy changes.

SRC member questions and comments:

* Suggestion that DOR be involved with the implementation of the Behavioral Health Services Act, specifically partnering with counties on the provision of employment services. All 59 behavioral health agencies must provide vocational services.
* Examples of how DOR will utilize the reallotment funding, such as expanding partnerships and moving program income to the independent living network.
* Suggestion that DOR connect with the Parent Training and Information Centers to increase Student Services.
* Suggestion of future agenda items:
  + Update on the phase out of subminimum wage
  + Update on the No Wrong Door advisory committee

Public comment: Danny Marquez representing the California Association of Social Rehabilitation Agencies (CASRA) noted that staffing shortages and challenges impact CASRA members and there is a need to increase capacity.

# Item 8: Integrating Employment in Recovery

Diane Shinstock, Manager, shared information on DOR’s Integrating Employment in Recovery (IER) initiative, a pilot program that incorporates the full range of vocational rehabilitation services into behavioral health treatment delivery. Information included opioid awareness and employment services, the opioid crisis, dangers of fentanyl, waves of opioid overdose deaths, statistics, efforts to address the crisis, an overview of the IER program, benefits of employment in recovery, IER program data, and key considerations (reference [appendix D](#_Appendix_D_–) for the full presentation).

SRC member comments and questions:

* Suggestion to use the term “reoccurrence” instead of “relapse” or “failure”
* How can we work with the SSI administration and Medicare systems so individuals can work and receive health care?
* Many individuals participating in substance abuse treatment programs do not identify as an individual with a disability and do not know they are eligible for DOR services.
* Explore partnership opportunities with IER/DOR and CalAIM and the Department of Health Care Services. CalAIM could be involved to assist with case management.
* It was noted that individuals with substance use disorders can be served in any DOR office.
* The SRC could consider a potential recommendation that the IER program make the services and supports provided to individuals with behavioral health disabilities permanent, either provided by DOR and/or by partnering with other state departments and community-based organizations.

Public comment: Chris Waltrous acknowledged the innovation of the IER program.

# Item 9: Voice Options Program

Regina Cademarti, Chief, DOR Independent Living and Assistive Technology Section, provided an overview of the Voice Options Program which provides eligible Californians who are unable to speak, or who have difficulty speaking, with a free speech-generating device. Information included an overview and background of the Voice Options Program, timeline, eligibility, roles and responsibilities of grantees, eligible expenses, roles and responsibilities of DOR staff, outcomes, and program impacts (reference [appendix E](#_Appendix_E_–) for the full presentation). Questions and comments from SRC members included the following:

* How will the Voice Options Program incorporate AI technology and devices?
* How can DOR consumers get connected to the Voice Options Program resources?
* How long is the waitlist for devices?

# THURSDAY, SEPTEMBER 12, 2024, AGENDA

# Item 10: Reconvene, Welcome, and Introductions

Ivan Guillen, SRC Chair, reconvened the meeting. SRC members introduced themselves.

# Item 11: Public Comment

Danny Marquez representing CASRA commented that additional resources and support are needed for DOR’s Community Resources Division to help organizations become vendorized so these organizations can provide services to DOR consumers. Some organizations report waiting over one year to become vendorized.

# Item 12: Benefits Planning Report

Maria Aliferis-Gjerde, Executive Officer, and Taylor Winchell, Chair, California Committee on the Employment of People with Disabilities (CCEPD), presented the Benefits Planning Report, developed by a workgroup of disability-related advisory bodies to address barriers to employment that individuals with disabilities experience due to income and asset limits related to cash, health, and long-term services and support benefits. Information was shared on why the report is needed, topic areas of the report, and the goals of the report. The report recommendations regarding the Social Security Administration, benefits planning infrastructure, health care, and long-term services and supports were reviewed. Aliferis-Gjerde and Winchell spoke about the next steps (reference [appendix F](#_Appendix_F_–) for full presentation). SRC member question and comments included the following:

* Appreciation for the report and recommendations.
* Suggestion that perhaps a leadership position at the CalHHS level is needed to oversee benefits planning.
* Comment that agencies often work in silos and IT systems are outdated.
* Having to prove and document your disability over and over again is burdensome.
* What leadership and actions (legislative, budgetary) are needed to implement the report recommendations?
* Suggestion to incorporate Aging and Disability Resource Connection (ADRCs), Independent Living Centers (ILCs), Health Insurance Counseling & Advocacy Program (HICAP) as resources in the report.

Public comment: Danny Marquez stated that CASRA strongly supports the report and implementation of the recommendations.

# Item 13: VR Services Portion of the Unified State Plan Update

Peter Frangel, Manager, DOR Policy & Performance Section, provided an update on DOR’s VR Services Portion of the Unified State Plan (reference [appendix G](#_Appendix_G_–) for the full presentation). Background information was provided, and the State Plan timeline was reviewed. Frangel reviewed the new State Plan goals and objectives for 2024 – 2027:

* Goal 1: Increase the unsubsidized employment rate of participants during the second and fourth quarter after exit from program.
* Goal 2: Support increased work-based learning including intermediate employment, career technical education and training, and post-secondary education for all CDOR participants receiving VR services.
* Goal 3: Expand and improve VR services to those who have been underserved and underrepresented in the VR program.
* Goal 4: Provide effective VR services with quality IPE developments consistent with in-demand workforce needs that lead to a career track offering sustainable living wages.
* Goal 5: Support businesses in California to employ more individuals with disabilities
* Goal 6: Improve California state government employers’ parity rate for hiring and promotion of people with disabilities.
* Goal 7: Increase the number of students with disabilities, ages 16-21, who receive high quality Pre-Employment Transition Services, also known as CDOR Student Services.
* Goal 8: Increase the percentage of students with disabilities receiving CDOR Student Services who go on to receive VR services.

Frangel concluded by reviewing the State Plan performance measures. SRC member questions and comments included the following:

* Appreciation for the presentation and how the information was organized.
* There is a need for additional staff members to do business outreach to set up work experience for students.
* New SRC members are encouraged to familiarize themselves with the State Plan as it guides the provision of VR services.
* Appreciation for the expansion of Student Services and work experience opportunities. Suggestion to increase youth centered/age-appropriate marketing of Student Services.
* Comment that increasing the number of students served will require additional intake by DOR counselors.
* Objective 3.1 in the 2024-27 State Plan sets a goal of consumer quarterly median earnings around $7,000. This is less than a living wage, due in part to some consumers wanting to work part-time. It was asked if the SRC can receive data on DOR consumers who are working full-time and gainfully employed for comparison purposes. Frangel explained that the formula utilized is a median, not an average, and is based on all individuals who are employed the second quarter after exiting from the VR program. It includes individuals who worked full time, and individuals who worked part-time or only a few hours. Determining data on the number of consumers earning a living wage is difficult due to how the data is gathered and formulated. It was noted that the SRC could consider a recommendation that DOR provide data on DOR consumers who are earning a living wage.
* Reminder that the development of the State Plan goals and priorities should be an ongoing collaboration between the SRC and DOR.

# Item 14: State Independent Living Council Updates

Carrie England, Executive Director, and Shannon Coe, Member, State Independent Living Council (SILC), shared information on the SILC’s current priorities, projects, and the SILC’s State Plan for Independent Living (SPIL) (reference [appendix H](#_Appendix_H_–) for the full presentation). The 2025-2027 SPIL is in effect October 1, 2024-September 30, 2027. The SPIL is the guiding document for the state’s Independent Living Services. The SPIL contains 3 major goals and many smaller objectives relating to those goals.

* Goal 1: Systems Change Advocacy
* Goal 2: Transition and Diversion
* Goal 3: Funding

It was confirmed that SILC allocates some network funding (ex: systems change, assistive technology (AT) funds, older individuals who are blind (OIB) program funding) as competitive grants and each Independent Living Center (ILC) can apply for these grants. Each ILC receives state and federal funding.

# Item 15: Adopt-a-Region Report Outs

SRC members reported out from recent discussions with their assigned DOR Regional Directors.

Theresa Comstock, SRC member, connected with Sean Nunez, Regional Director, DOR Redwood Empire District. Strengths include a partnership with the Napa State Hospital, including communication with consumers about employment, developing plans for training and education upon discharge, work opportunities at refineries, and development of transferrable skills. There are efforts to identify felon-friendly employers. Comstock spoke about Student Services being offered at the Pinoleville Reservation which include training for trades. She noted that DOR is helping with transportation. A difficulty in the Redwood Empire District are requests from consumers to use “fly by night” private schools that are not accredited or licensed.

Comstock also connected with Brian Winic, Regional Director, and Justin McIntire, District Administrator, DOR Santa Barbara District. Successes in the District include expedited enrollment and increases in the number of individuals requesting services. Regional collaborations include a recent presentation in Ventura at the Disability Conference with Cal State Channel Islands. The District will partner in the future with county jails in Santa Maria and Santa Barbara to help with the transition process. The District also plans to partner with juvenile services. A challenge in the District is the availability of sign language interpreters and efforts are taking place to work with the DOR Central Office Deaf and Hard of Hearing Services team to fill contracts. Contractors often need lodging because they are coming from a distance.

Ivan Guillen, SRC Chair, did not meet with the DOR San Diego District leadership, but reported that the District is receiving a lot of new applications which does lead to an increase in appeals. The District has several new staff members which can result in inconsistencies in how regulations are interpreted. Particular regulations that are challenging include private vs. public schools, comparable services and informed choice.

Chanel Brisbane, SRC Vice-Chair, met with Sherri Han-Lam, Regional Director, DOR Orange San Gabriel District. The District is partnering with local courts to train individuals for court reporting positions. They are having success with the Pathways to Success project and the competitive integrated employment subminimum wage project. The District met their placement goal, with 940 individuals securing employment opportunities. Future District initiatives will focus on behavioral health.

La Trena Robinson, SRC Treasurer, met with Vivian Hernandez-Obaldia, covering Regional Director for the DOR San Francisco District. The District is facing challenges with transitioning to new leadership, as both the Regional Director and District Administrator positions are vacant. Efforts are being made to stabilize casework and adjust work schedules. The District is working to increase opportunities for students receiving pre-employment transition services.

Hilary Lentini, SRC member, connected with Erwin Petilla, District Administrator, and Maria Turrubiartes, Regional Director, DOR Greater Los Angeles District (GLAD). Lentini is providing subject matter expert consultation to the District on self-employment plans. Lentini noted that it would be beneficial to change “self-employment” to “entrepreneur protocol” as this terminology better reflects what it takes to run a successful business. GLAD has closed 117 successful cases in the first two months of the program year. Key objectives include increasing the ratio of successful closures and supporting businesses. Initiatives for smoother transitions from student services to vocational rehabilitation and self-employment promotion were discussed. A civil service job fair was hosted with significant participation. The new Community Resource Navigator position in GLAD has improved service quality for consumers.

Brittany Comegna, SRC member, met with Della Randolph, Regional Director, and Roberto Solorzano, District Administrator, DOR Greater East Bay District. A challenge in the District is staff vacancies. The high cost of living in the Bay Area makes it difficult to recruit and retain new employees. While they offer an additional $200 monthly salary for VR Counselors for recruitment and retention, this amount is insufficient to offset the area's high living expenses. Additionally, the pandemic led to the retirement of many experienced staff members, further downsizing their workforce and resources. However, they have found a creative solution by partnering with the DOR Inland Empire District, which has a remote team that assists in serving consumers in the East Bay area. The Greater East Bay District has several transition partnership programs, including one in Fremont, to enhance service delivery and address staffing shortages.

Comegna also met with Maureen McIntyre, Regional Director, and Denise McKnight, District Administrator, DOR Van Nuys Foothill District. The District’s goal is to successfully close 1,000 cases this fiscal year and is making progress toward this target. The District is excited about partnering with California State University, Northridge (CSUN) and its Explorers program, which supports individuals with developmental disabilities aged 18 to 28. The District is working with shelters and justice-involved youth to prepare them for employment, focusing on those in behavioral health treatment. The District wants to improve the sustainability of a consumer’s employment by educating consumers on job benefits such as 401(k) plans, healthcare, and college savings, helping to ensure consumers can make informed decisions about job offers. The District is recruiting for a Rehabilitation Counselor for the Deaf, and this position has been challenging to fill.

New SRC members were assigned to the following Districts:

* Eli Gelardin – San Joaquin Valley
* Shannon Coe – Northern Sierra
* Gregory Meza – San Jose

# Item 16: Policy Committee Report Out

Chanel Brisbane, SRC Vice-Chair and Policy Committee Chair, provided a report out from the August 8, 2024 SRC Policy Committee meeting. Highlights from the meeting included the following:

* Public comment was submitted by Jan Johnston-Tyler, Founder and CEO of EvoLibri regarding concerns with the cost of Commission on Accreditation of Rehabilitation Facilities, also known as “CARF”.
* Kate Bjerke, SRC Executive Officer, provided a report on updates that have been made to the VR application based on the SRC’s suggestions and feedback.
* Megan Davis and Peter Frangel from DOR’s Policy & Performance Section provided an overview presentation of maintenance supports available for DOR consumers, covering the regulatory definition, examples, considerations and documentation requirements. Shayn Anderson, DOR Regional Director, San Joaquin District, provided examples of consumer maintenance supports.
* The DOR is currently analyzing a decision released on August 5th from the California Court of Appeal, 4th Appellate District regarding the interpretation of the term “maintenance”. DOR representatives will provide an update to the SRC when the analysis is complete.

It was confirmed that the Health Questionnaire is no longer utilized by DOR as part of the application process. VR Counselors utilize their expertise to determine if an individual has a disability that is a barrier to employment, qualifying the individual for VR services.

# Item 17: Election of the 2024-25 SRC Officers

Kate Bjerke, SRC Executive Officer, presented the slate of candidates recommended by the SRC Nominating Committee on August 29, 2024. During this Nominating Committee meeting, it was recommended that the 2023/24 SRC Chair, Vice-Chair and Treasurer be listed as the slate of candidates for the 2024/25 Officer election to serve a second term in their respective roles:

* Chair: Ivan Guillen
* Vice-Chair: Chanel Brisbane
* Treasurer: La Trena Robinson

The floor was then open for additional nominations. None were received.

It was moved/seconded (Comstock/Coe) to elect Ivan Guillen as SRC Chair, Chanel Brisbane as Vice-Chair, and La Trena Robinson as SRC Treasurer for the October 1, 2024 – September 30, 2025 term. (Yes – Guillen, Comegna, Comstock, Coe, Brisbane), (No – 0), (Absent for vote – Gelardin, Robinson, Lentini, Meza), (Abstain – 0).

# Item 19: Debrief and Recommendations Discussion

SRC members debriefed from the meeting discussions and developed the following policy recommendations:

SRC Recommendation 2024.1 – Benefits Planning

The SRC supports the policy recommendations included in the *2024 Benefits Planning Report* developed by the California Committee on the Employment of People with Disabilities (CCEPD) workgroup of disability-related advisory bodies.

SRC Recommendation 2024.2 – VR Terminology

The SRC recommends that a glossary in plain language, within the vocational rehabilitation (VR) context, of VR terminology (example: disability, conservator, Community Rehabilitation Program, etc.) be made available to interested individuals, applicants and consumers on the DOR website and attached to the DOR application. A glossary may be a helpful reference when individuals apply for VR services without an advocate or DOR staff member present.

SRC Recommendation 2024.3 – CARF Accreditation

The SRC recommends that the DOR Community Resource Division (CRD) conduct a survey of Community Rehabilitation Programs (CRPs) currently providing services to DOR consumers to gather information on the following:

* CRP expenditures,
* Revenue from providing VR services,
* Cost of becoming Commission on Accreditation of Rehabilitation Facilities (CARF) accredited,
* Benefits to the CRP of having CARF accreditation, and,
* Barriers that CARF accreditation creates for the CRP.

It was moved/approved (Comstock/Brisbane) to adopt policy recommendations 2024.1, 2024.2, and 2024.3 (Yes – Guillen, Comegna, Comstock, Coe, Brisbane, Lentini), (No – 0), (Absent for vote – Gelardin, Robinson, Meza), (Abstain – 0). The recommendations will be submitted to the DOR Directorate.

The SRC members discussed future agenda items and the following topics were identified:

* Follow up presentation on self-employment.
* Update on the phase out of subminimum wage.
* Update on No Wrong Door initiative.
* Private vs public schools, accreditation issues, and policy exceptions.
* Expedited enrollment delays update due to staff shortages.
* DOR strategic planning about recruiting qualified staff
* Update on the New Counselor Academy and leadership training for VR counselors interested in promoting.

# Item 20: Selection of 2024/25 Meeting Dates

The SRC members agreed upon the proposed meeting schedule for the 2024/24 term as presented:

| **Date** | **Time** | **Meeting** |
| --- | --- | --- |
| October 17, 2024 | 10:00 a.m. – noon | Policy Committee |
| October 29, 2024 | 1:00 – 2:00 p.m. | Executive Planning Committee |
| November 14, 2024 | 10:00 a.m. – noon | Policy Committee |
| December 4 – 5, 2024 | 9:00 a.m. – 4:00 p.m. | Quarterly Meeting |
| December 12, 2024 | 10:00 a.m. – noon | Policy Committee |
| January 9, 2025 | 10:00 a.m. – noon | Policy Committee |
| February 11, 2025 | 1:00 – 2:00 p.m. | Executive Planning Committee |
| February 13, 2025 | 10:00 a.m. – noon | Policy Committee |
| March 5 – 6, 2025 | 9:00 a.m. – 4:00 p.m. | Quarterly Meeting |
| April 10, 2025 | 10:00 a.m. – noon | Policy Committee |
| May 8, 2025 | 10:00 a.m. – noon | Policy Committee |
| May 20, 2025 | 1:00 – 2:00 p.m. | Executive Planning Committee |
| June 11 – 12, 2025 | 9:00 a.m. – 4:00 p.m. | Quarterly Meeting |
| July 10, 2025 | 10:00 a.m. – noon | Policy Committee |
| August 14, 2025 | 10:00 a.m. – noon | Policy Committee |
| August 19, 2025 | 1:00 – 2:00 p.m. | Executive Planning Committee |
| September 10 – 11, 2025 | 9:00 a.m. – 4:00 p.m. | Quarterly |

# Item 21: Adjourn

It was moved/seconded (Comegna/Coe) to adjourn the September 11 – 12, 2024 SRC quarterly meeting.

# Appendix A - Self-Employment Overview Presentation

## Slide 1: **Self Employment Overview**

September 11, 2024

SRC Quarterly Meeting

## Slide 2: Self Employment (SE) Defined:

An employment setting in which an individual works in a chosen occupation, for profit or fee, in their own small business, with control and responsibility for decisions affecting the conduct of the business.

* Sole proprietorship
* Responsibility for decision making that affects the business
* Intended to meet ongoing living expenses
* Must comply with local/state/federal laws

## Slide 3: What DOR Can and Cannot Provide:

CAN PROVIDE:

* Most of our businesses are truly small, typically sole-proprietor
* Start-up goods/inventory for first 6 months of business operation
* Short, focused training to update skills or required certifications
* Support in developing a feasibility assessment and then a business plan

CANNOT PROVIDE:

* Multi-level marketing businesses
* Businesses that do not meet the values of the State or Federal government
* Franchise license fees

## Slide 4: Informed Choice

Prior to development of an Individualized Plan for Employment, the Rehabilitation Counselor shall discuss with the individual:

* The criteria and process for assessing whether the proposed self-employment setting is appropriate.
* The scope of VR services that may be provided by DOR to assist an eligible individual to achieve employment in a self-employment setting.
* The eligible individual’s responsibility to identify and obtain resources that may be necessary to establish and operate the proposed small business.

## Slide 5: Roles and Responsibilities

## Slide 6: Rehabilitation Counselor Responsibilities:

* Conduct the necessary and appropriate assessments
* Assist the individual to explore and identify the vocational goal to pursue in a self-employment setting
* Provide consultation and technical assistance to help the consumer with the following:
  + Prepare a summary of the proposed small business
  + Prepare a Small Business Plan with the consumer when more detailed information is necessary beyond the information in the summary
  + Identify and obtain resources that may be necessary to establish and operate the proposed small business

## Slide 7: Consumer Responsibilities:

* Complete self-assessment(s) about self-employment readiness
* Develop the business idea and structure of the business
* Evaluate the feasibility of the business
* Establish linkages with business development supports
* Develop a business plan
* Secure business start-up funds
* Start and operate the business

## Slide 8: Subject Matter Expert (SME) Roles and Responsibilities:

* The SE SME is responsible to provide consultation, technical assistance, and training during the Pre-Plan, In-Plan, and Post-Employment phases to help the Rehabilitation Counselor and VR team.
* The SE SME is responsible for the following:
  + Be familiar and remain up to date on regulations.
  + Disseminate tools and resources.
  + Identify local S.C.O.R.E. and other regional resources to help the VR team.
  + Train the VR Teams as appropriate in a variety in technical topics related to self-employment

## Slide 9: Small Business Consultant Role:

A Small Business Consultant is an individual who is qualified by education, training, and experience to provide consultation to the Department and to an individual who is interested in working in a proposed self-employment setting regarding the development of a small business plan and the establishment and operation of a small business.

A small business consultant may:

* Help assemble a funding package.
* Conduct a feasibility analysis.

## Slide 10: Individualized Plan for Employment (IPE) and Determining When a Self-Employment Setting is Appropriate

## Slide 11: Contents of the IPE:

The employment outcome in an IPE shall include:

1. The occupation in which the individual seeks to be employed.

2. A description of the proposed self-employment setting.

3. VR services to assist the eligible individual to achieve the employment outcome.

4. If additional information is required to assess whether the proposed self-employment setting is appropriate, identification of additional assessment activities and services that will be provided to obtain such additional information.

## Slide 12: When Self-Employment Setting is Appropriate:

When it has been determined that the self-employment setting is appropriate, the IPE shall identify:

1. Any one-time, initial costs of establishing the proposed small business in which the individual will be self-employed to be provided by DOR.
2. The estimated date upon which the individual is to begin working in the self-employment setting and operating the small business.

## Slide 13: When Self-Employment Setting is NOT Appropriate:

If it has been determined that the self-employment setting is not appropriate, the IPE shall be amended to:

* identifying how DOR can support the eligible individual in their employment outcome in a self-employment setting.

For example, are there services that DOR could provide to fill in gaps in knowledge, skills, or abilities before shifting to a new employment setting?

* Include an alternative employment setting.
* Identify any VR services to be provided to assist the individual to achieve employment in the individual’s chosen occupation in the alternative setting.

## Slide 14: Assessing the Self-Employment Setting and the Proposed Small Business

## Slide 15: Assessing the Self-Employment Setting:

A proposed self-employment setting is appropriate when:

1. Working in the proposed self-employment setting is consistent with the individual’s strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.
2. The proposed small business in which the individual will be self-employed is reasonably likely to produce sufficient income, within a reasonable period after the individual begins operating the business, not to exceed 12 months, to:
   1. Pay the necessary ongoing operating expenses of the small business.
   2. Provide income for the individual at or above minimum wage, but not less than the customary wage and benefit level received by individuals engaged in the same or similar self-employment.

## Slide 16: Assessing the Self-Employment Setting Continued:

1. The individual can obtain all resources necessary to establish and operate the proposed small business, including any resources necessary to fund the ongoing operating expenses of the business and to support the individual’s basic living expenses during the period until the small business produces the income.
2. The Department shall consider any existing information; the summary of the proposed small business; and information obtained through assessments including, development and review of a Small Business Plan.

## Slide 17: Summary of the Proposed Small Business Requirements:

1. Description of the service or product the small business will sell or provide
2. Projected income and expenses for the first year of operation
3. Number of monthly hours the individual will work
4. One-time initial costs necessary to establish the business
5. The individual’s resources
6. A marketing analysis and marketing strategy
7. Staffing needs such as employees

*Source: CCR title 9, Section 7136.8(a)*

## Slide 18: Small Business Plan Elements:

The main elements of a Small Business Plan includes:

* Executive Summary
* Business Description
* Marketing Plan
* Management and Operations Plan
* Financial Plan
* Supporting Documents

## Slide 19: Scope of Services Provided for Self-Employment Setting

## Slide 20: Scope of Services:

* Assessments
* Technical Assistance
* Training/Education
* One-time, initial costs
* Source: CCR title 9, Section 7137(a)

## Slide 21: One Time, Initial Costs:

* Occupational license fees
* Purchase or lease of tools or equipment
* Initial stock & supplies not to exceed six months
* Initial deposits required for rental agreements or utility services (also may include 1st & last month’s rent)
* Source: CCR title 9, Section 7137(b)

## Slide 22: Costs Not Included:

* Expansion of a small business
* Lease or purchase of real property
* Construction or remodeling of real property
* Taxes or liens
* Patent fees or product development
* Refinancing, debt repayments, or losses
* Business franchises or business purchases
* Vehicles leases or purchases
* Employee wages and benefits
* Funding for ongoing operation expenses
* *Source: CCR title 9, Section 7137(d)*

## Slide 23: Monitoring the Operations of the Small Business

## Slide 24: Monitoring the Individualized Development Plan (IPE):

It is the responsibility of the Rehabilitation Counselor to monitor the individual’s employment in the SE setting, as specified in the IPE, after the individual begins operating the small business, for a period of no less than 90 days and no more than 12 months, unless more time is warranted and agreed upon by the Counselor and consumer.

* Regular meetings
* Individual’s preparation of monthly income and expense reports
* Review of reports by the QRP and/or Small Business Consultant
* Comparison of reports with projected income & expenses by QRP and/or Small Business Consultant

# Appendix B – DOR Student and Consumer Handbook Presentation

## Slide 1: DOR Student and Consumer Handbook

A Guide to Pre-employment and Employment Services

Program Policy Section

September 11, 2024

## Slide 2: Federal Regulatory Requirements for Content

* Informed Choice
* Application Process
* Assessment Process
* Eligibility
* Order of Selection
* Individualized Plan for Employment (IPE)
* Financial Participation
* Referrals
* Discrimination
* Client Assistance Program (CAP); Rights and Remedies
* Confidentiality

## Slide 3: “North Star” for Revised Handbook

* Balance regulatory requirements with usefulness of the handbook.
* Utilize user-friendly question and answer format.
* Use of plain language.
* Ensure accessibility for all users.

## Slide 4: Table of Content Topics

* Welcome Message
* About the VR Program
* Accessibility
* Confidentiality
* DOR Mission Statement
* Nondiscrimination
* Services for Students and Youth
* The Application Process
* Eligibility
* Developing an IPE
* Employment Services
* Tips and Contact Information
* Financial Participation
* What is the CAP?
* Appeal Procedure
* DOR District Offices

## Slide 5: Highlights of Updated Content

* Formatting updates with an emphasis on accessibility and gender neutrality.
* Student Services.
* Title IX nondiscrimination and Office of Civil Rights (OCR) contact information (email and phone number).
* Contact information for counselor, CAP at Disability Rights California (DRC), and DOR district offices.

## Slide 5: Next Steps

* Final review by DOR Program Deputies, Legal, and OCR.
* Obtain input from advisory bodies.
* Introduce to field leadership and share with DOR staff.
* Publish handbook to DOR internet and intranet websites.
* Translate into five threshold languages per California Health and Human Services Agency and DOR Language Access policies.

## Slide 7: Questions and Answers

Q&A

# Appendix C – Consumer Satisfaction Survey Results Presentation

## Slide 1: Consumer Satisfaction Survey 2023/24 Results

Presented by: Planning Unit

## Slide 2: Today’s Agenda

* Planning Team Introductions
* Consumer Satisfaction Survey (CSS): Background and Methodology
* Consumer Satisfaction Survey (CSS): Overview of Results and Trends
* Questions/Feedback for the Planning Team

## Slide 3: Meet the Team

Luis Lewis, Planning Unit Manager

* 10+ years with DOR
* Political Science Degree
* Avid Concert Goer
* Dog father of two

Judy Gonzalez, Research Data Analyst

* 8+ years with DOR
* Studied Computer Science
* Avid cycler, hiker, gardener
* Double century cycler

Julia Ma, Research Data Analyst

* 3+ years research experience
* Studied statistics
* Loves to cook
* Boba/tea enthusiast

## Slide 4: CSS Background and Methodology

## Slide 5: What is the CSS and why do we do it?

Collaborative effort between Department of Rehabilitation (DOR) and State Rehabilitation Council (SRC).

Federally required: [34 CFR 361.17 (h)](https://www.law.cornell.edu/cfr/text/34/361.17)

Purpose of CSS:

* Ensure DOR provides high quality services to its consumers
* Ensure DOR provides effective services that result in employment outcomes
* Strengthen partnerships with consumers and the community
* Assist Comprehensive Statewide Needs Assessment (CSNA) development

## Slide 6: Methodology (1 of 3)

Invitations sent only to individuals with an IPE (Open & Closed Cases)

9% of DOR’s consumers with an IPE received survey

Survey population

* VR cases – 89,545
* VR cases with IPE – 76, 487
* CSS invitations sent – 7,366

## Slide 7: Methodology (2 of 3)

* 7,336 CSS invitations sent
  + 7,318 SurveyMonkey email (7,297 with valid email address)
  + 18 surface mail
* CSS email invitations
  + Invitations sent – 7,297
  + Invitations opened – 5,475
  + Invitations completed – 973

## Slide 8: Methodology (3 of 3)

CSS Separated into five unique sections:

* Section 1 – Overall, DOR Experience (1 question)
* Section 2 – DOR Counselor Experience (5 questions)
* Section 3 – Service Provider Experience (4 questions)
* Section 4 – Employment Services Experience (4 questions)
* Section 5 – Current Employment Experience (4 questions)

Aware Utilization

Demographic data points (i.e. District, Race/Ethnicity, Disability Type, Age)

Additional data points as needed/requested for analysis

## Slide 9: CSS Results

## Slide 10: Respondent Characteristics (1 of 2)

* Respondents by Age Group  
  Above 70 years old: 14
* 60-69 years old: 88
* 50-59 years old: 171
* 40-49 years old: 183
* 30-39 years old: 191
* 20-29 years old: 265 (27%)
* Below 20 years old: 61

Respondents by Race/Ethnicity:

* American Indian or Alaska Native: 27
* Asian: 69
* Black or African American: 125
* Hispanic or Latino: 355 (36%)
* Native Hawaiian or Other: 3
* Race not reported: 25
* Two or more races: 54
* White: 670 (68%)

## Slide 11: Respondent Characteristics

Respondents by Disability Type:

* Auditory/Communicative Disabilities: 38
* Intellectual and Learning Disability: 315
* Physical Disabilities: 207
* Psychiatric Disabilities: 362 (37%)
* Visual Disability: 51

Respondents by District

* District 110 – 52
* District 130 – 85
* District 150 – 90
* District 210 – 77
* District 230 – 47
* District 250 – 44
* District 320 – 68
* District 340 – 67
* District 350 – 73
* District 410 – 103 (11%)
* District 440 – 68
* District 530 – 62
* District 550 – 89
* District 560 – 48

## Slide 12: Highest Satisfaction Scores (overall)

* 83% - my life is more independent because of DOR services
* 81% - my service providers treat me with courtesy and respect
* 80% - I am satisfied with the type of work I do at my job
* 80% - my counselor treats me with courtesy and respect.

## Slide 13: Lowest Satisfaction Scores (overall)

* 66% - my counselor provided me with guidance and information to help me better understand my disabilities, skills and abilities
* 63% - my counselor provided me guidance and information that helped me understand the jobs in my area and how to get hired by businesses.
* 68% - my DOR team connects me to the right agencies and service providers for my needs.
* 64% - I understand and am comfortable with the process for appealing a DOR decision that I disagreed with
* 55% - DOR services have improved my chance to find a job.

## Slide 14: District Satisfaction Scores (overall)

* 71% - Average Satisfaction Score
* 82% - Highest Satisfaction Score (District 350 – San Diego)
* 60% - Lowest Satisfaction Score (District 210 – Greater East Bay)
* 57% - Percent of Districts with a Satisfaction Score above average

Bar graph: Satisfaction Score by District

* District 110: 74%
* District 130: 72%
* District 150: 74%
* District 210: 60%
* District 230: 74%
* District 250: 68%
* District 320: 76%
* District 340: 69%
* District 350: 82%
* District 410: 69%
* District 440: 65%
* District 530: 73%
* District 550: 81%
* District 560: 63%

## Slide 15: Age Group Satisfaction Scores (overall)

* 70% - Average Satisfaction Score
* 75% - Highest Satisfaction Score (Below age 20 and 40-49 years)
* 61% - Lowest Satisfaction Score (Above age 70)

Bar graph: Satisfaction Score by Age Group

* District 110: 74%
* District 130: 72%
* District 150: 74%
* District 210: 60%
* District 230: 74%
* District 250: 68%
* District 320: 76%
* District 340: 69%
* District 350: 82%
* District 410: 69%
* District 440: 65%
* District 530: 73%
* District 550: 81%
* District 560: 63%

## Slide 16: Case Status Satisfaction Scores (overall)

Case Status Definitions

* Service: Receiving DOR services.
* Employed: Obtained a job and moving towards Successful Closure.
* Closed from Service Status: Received DOR services, but did not meet VR requirements for Successful Closure.
* Successful Closures: Received DOR services and met all VR requirements.

Bar Graph: Satisfaction Score by Case Status

Scores:

* Service: 72%
* Employed: 85%
* Closed from Service Status: 53%
* Successful Closures: 80%

## Slide 17: Highest and Lowest Satisfaction Scores (Case Status)

Highest Satisfaction Scores

| **Case Status** | **Highest Rated Question** | **Score** |
| --- | --- | --- |
| Service Status | My counselor treats me with courtesy and respect. | 81% |
| Service Status | My service providers treat me with courtesy and respect. | 81% |
| Employed Status | My life is more independent because of DOR services. | 95% |
| Closed from Service Status | My life is more independent because of DOR services. | 80% |
| Successful Closures | I am satisfied with the type of work I do at my job. | 89% |
| Successful Closures | My life is more independent because of DOR services. | 89% |

Lowest Satisfaction Scores

| Case Status | Lowest Rated Question | Score |
| --- | --- | --- |
| Service Status | DOR services have improved my chance to find a job. | 59% |
| Employed Status | DOR services have improved my chance to find a job. | 25% |
| Closed from Service Status | DOR services have improved my chance to find a job. | 36% |
| Successful Closures | DOR services have improved my chance to find a job. | 61% |

## Slide 18: Highest and Lowest Satisfaction Scores (Disability Type)

Highest Satisfaction Scores

|  |  |  |
| --- | --- | --- |
| Disability Category | Highest Rated Question | Score |
| Auditory/Communicative Disabilities | My service providers treat me with courtesy and respect. | 73% |
| Intellectual and Learning Disability | My life is more independent because of DOR services. | 84% |
| Physical Disabilities | My counselor treats me with courtesy and respect. | 81% |
| Psychiatric Disabilities | My life is more independent because of DOR services. | 89% |
| Visual Disability | I am satisfied with the wages and benefits I receive from my job. | 91% |

Lowest Satisfaction Scores

|  |  |  |
| --- | --- | --- |
| Disability Category | Lowest Rated Question | Score |
| Auditory/Communicative Disabilities | DOR services have improved my chance to find a job. | 24% |
| Intellectual and Learning Disability | DOR services have improved my chance to find a job. | 58% |
| Physical Disabilities | DOR services have improved my chance to find a job. | 47% |
| Psychiatric Disabilities | DOR services have improved my chance to find a job. | 61% |
| Visual Disability | DOR services have improved my chance to find a job. | 48% |

## Slide 19: Unemployment Reasons

* 571 respondents provided unemployment reasons.
* Respondents were able to select multiple unemployment reasons.

Bar chart of unemployment reasons:

* "I am still looking." – 249 respondents, 44%
* "I am a student." – 244 respondents, 43%
* "DOR did not assist me in finding a job." – 134 respondents, 23%
* "I need additional help to find a job." – 130 respondents, 23%
* "My disability prevents me from working." – 87 respondents
* "Lack of transportation or no transportation." – 70 respondents
* "There are no jobs available to me that are consistent with my DOR employment plan." – 56 respondents
* "No jobs are available that I want." – 54 respondents
* "I am not ready to start working." – 41 respondents
* "I do not want to give up my SSI/SSDI benefits." – 36 respondents, 6%
* "I have family issues such as daycare or caring for a relative." – 22 respondents

## Slide 20: CSS Trends

## Slide 21: CSS Trends (1 of 2)

**Satisfaction with DOR Counselors**

Understands my disability, skills, and abilities:

SFY 2020-21: 81%

SFY 2021-22: 78%

SFY 2022-23: 74%

SFY 2023-24: 72%

Provided guidance to help me understand my disability, skills, and abilities:

SFY 2020-21: 73%

SFY 2021-22: 71%

SFY 2022-23: 68%

SFY 2023-24: 66%

Provided me with employment guidance:

SFY 2020-21: 70%

SFY 2021-22: 68%

SFY 2022-23: 65%

SFY 2023-24: 63%

Treats me with respect:

SFY 2020-21: 87%

SFY 2021-22: 85%

SFY 2022-23: 80%

SFY 2023-24: 80%

Responds timely:

SFY 2020-21: 77%

SFY 2021-22: 76%

SFY 2022-23: 72%

SFY 2023-24: 71%

**Satisfaction with Service Providers**

Overall Satisfaction

SFY 2020-21: 76%

SFY 2021-22: 76%

SFY 2022-23: 74%

SFY 2023-24: 75%

Understands my disability, skills and abilities

SFY 2020-21: 79%

SFY 2021-22: 78%

SFY 2022-23: 74%

SFY 2023-24: 73%

Treats me with respect

SFY 2020-21: 88%

SFY 2021-22: 85%

SFY 2022-23: 80%

SFY 2023-24: 81%

Responds promptly

SFY 2020-21: 80%

SFY 2021-22: 78%

SFY 2022-23: 75%

SFY 2023-24: 74%

## Slide 22: CSS Trends (2 of 2)

**Satisfaction with Employment Services**

I’m involved with setting goals with my counselor

SFY 2020-21: 75%

SFY 2021-22: 73%

SFY 2022-23: 72%

SFY 2023-24: 71%

I am comfortable with telling my counselor when we disagree about employment goals

SFY 2020-21: 79%

SFY 2021-22: 75%

SFY 2022-23: 73%

SFY 2023-24: 71%

DOR connects me to the right agencies and providers

SFY 2020-21: 73%

SFY 2021-22: 71%

SFY 2022-23: 68%

SFY 2023-24: 68%

I understand the DOR appeals process

SFY 2020-21: 71%

SFY 2021-22: 67%

SFY 2022-23: 66%

SFY 2023-24: 64%

**Satisfaction with Current Employment**

Type of Work

SFY 2020-21: 75%

SFY 2021-22: 86%

SFY 2022-23: 84%

SFY 2023-24: 80%

Wages and Benefits

SFY 2020-21: 70%

SFY 2021-22: 75%

SFY 2022-23: 78%

SFY 2023-24: 77%

Alignment with IPE

SFY 2020-21: 75%

SFY 2021-22: 86%

SFY 2022-23: 79%

SFY 2023-24: 74%

Increased Independence

SFY 2020-21: 74%

SFY 2021-22: 83%

SFY 2022-23: 84%

SFY 2023-24: 83%

DOR services have improved my chance to find a job

SFY 2020-21: 70%

SFY 2021-22: 58%

SFY 2022-23: 50%

SFY 2023-24: 55%

## Slide 23: Questions/Feedback

## Slide 24: What DOR Consumers Are Saying

District 130

“My services from the Roseville DOR have been excellent! I’ve been really succeeding at school so far and I only have 5 months left before I graduate!”

District 150

“This program is changing my life. Not only my life but the future of my family. I am blessed to be apart of this program. I thank God every day.”

District 230

“I am now fully functional and able to take good care of myself. It's great to be back on my feet again and I encourage everyone that has disabilities never give up hope because there is light at the end of the tunnel.”

District 250

“I received a lot of support from the DOR, and I will be very grateful my entire life. They will always be in my heart because they gave me the necessary tools to move forward and to have a better future not only for me, but also for my family. Thank you infinite.”

## Slide 25: Contact Information

Planning Unit

Luis Lewis, Manager, [Luis.Lewis@dor.ca.gov](mailto:Luis.Lewis@dor.ca.gov)

Judy Gonzalez, Research Data Analyst II, [Judy.gonzalez@dor.ca.gov](mailto:Judy.gonzalez@dor.ca.gov)

Julia Ma, Research Data Analyst II, [Julia.Ma@dor.ca.gov](mailto:Julia.Ma@dor.ca.gov)

# Appendix D – Integrating Employment in Recovery

## Slide 1: Opioid Awareness & Employment Services

Presented by Diane Shinstock

Integrating Employment in Recovery

## Slide 2: The Opioid Crisis

Used naturally for centuries for pain management

In the 1990’s, big pharma markets synthetic opioids as less addictive/lethal than other pain killers

## Slide 3: The Truth

## Slide 4: Dangers of Fentanyl

2mg, the amount on the tip of a pencil, can be enough to kill an average American.

## Slide 5: Three Waves of Opioid Overdose Deaths

Wave 1: Rise in prescription opioid overdose deaths started in the 1990s

Wave 2: Rise in heroin overdose deaths started in 2010

Wave 3: Rise in synthetic opioid overdose deaths started in 2013

Line graph showing deaths per 100,000 from 1999 to 2021 tracking any opioid, other synthetic opioids (e.g. Tramadol or Fentanyl, prescribed or illicitly manufactured), commonly prescribed opioids (natural and semi-synthetic opioids and methadone), and heroin.

## Slide 6: California Stats

Line graph showing opioid overdose deaths by opioid type, California, 2011 to 2019, rate per 100,000 population (age-adjusted).

Substance Use Disorders (Deaths)

* In 2019, more than 3,200 Californians died from an opioid-related overdose.
* The death rate from fentanyl increased 10-fold, from 0.3 deaths per 100,000 population in 2015 to 3.8 deaths per 100,000 population in 2019.
* The rate of deaths from heroin increased steadily from 2011 to 2019, while the rate of prescription overdose deaths decreased by 30% over the same period.

## Slide 7: Efforts to Address Crisis

* Major federal legislation
* Substance use prevention & treatment
* Foreign supply reduction
* Lawsuits against drug manufacturers\*
* Opioid Settlement Fund (OSF)
* DOR’s IER program

\*https://nationalopioidsettlement.com

## Slide 8: IER Program Overview

Opioid Settlement Funds (OSF):

* $4M one-time over 3 years (22-25)
* DOR Peer Support staff in 4 unique treatment centers
* Dedicated counselors
* Training the emerging workforce

## Slide 9: Benefits of Employment in Recovery

SAMHSA: Substance Use Disorders Recovery with a Focus on Employment and Education:

* Sustained recovery from SUD is significantly tied to meaningful and purposeful work-life balance
  + Lower rates of recurrence
  + Higher rates of abstinence
  + Less criminal activity
  + Fewer parole violations
  + Improvements in quality of life
  + More successful transition from long-term residential treatment back to the community
* Clients who are employed while in treatment are significantly more likely to successfully complete treatment than unemployed clients\*

\*Melvin, A. M., Koch, D., & Davis, S. (2012). Employment as a predictor of substance abuse treatment completion. *Journal of Rehabilitation, 78,* 31-37.

## Slide 10: IER Program Data

Stats

* 2087 served (Workshops/VR Services)
* 279 Open VR cases
  + 63 Eligible
  + 187 in training
  + 430+ Professionals trained

## Slide 11: IER Fiscal

Challenges:

* Underspending original projections
  + All OSF programs were underspent in year 1
  + Hiring challenges

Opportunities:

* VR spending
* Meta Analysis (SDSU)
* Indirect/Administrative costs

## Slide 12: Key Considerations

* Behavioral Health = Mental Health AND Substance use
* Most SUD consumers have a co-occurring disorder
* Treatment for SUD typically requires 6-7 attempts at treatment before success occurs
  + RELAPSE IS PART OF RECOVERY

## Slide 13: Key Considerations

* IER provides valuable, quality VR services to specialized population
* Dedicated/specialized team
* Counselors with knowledge/interest in BH/SUD
* \*Peer Support Engagement:
* Decreases drug & alcohol use
* Increases likelihood of treatment completion
* Creates a sense of belonging
* HOPE!

## Slide 14: Consumer Testimonials

* One consumer felt he could trust me because we had similar life experiences, and he says he can see himself doing what I did with my life and turning his life around. ~ IER Peer Support Specialist
* One consumer cried when the Peer Support Specialist called to do an intake, he was so grateful.
* “I really appreciate what you do. If it wasn’t for second chances, I wouldn’t be here today.”
* The Peer Support Specialist believes our clients can achieve their goals even when they don’t, despite their current loss of morale and living scenario.

## Slide 15: IER Team Testimonials

* I’ve spent most of my adult life advocating for a son who was diagnosed with a serious mental illness and substance use disorder. I’ve seen him struggle and felt and witnessed the pain the entire family has felt. His story is not much different than those DOR serves. Substance use destroys lives and kills good people. IER gives DOR a chance to innovate how services are delivered to a very marginalized population.. ~Diane Shinstock, Team Manager
* Having personal and family experiences with substance use, mental health, recovery, and unfortunately loss, directly impacted why I applied to work in the IER project. Many of us are impacted by SUD's or mental health challenges and this was a way to further help individuals with SUD and make a positive impact on their lives in a more direct way then any of my previous experiences with DOR. ~Cassie Kemic, Training Officer
* Supporting individuals with SUD provides a sense of identity, dignity, societal wellbeing, reduction in recidivism, unification of the family unit and economic productivity for the community they live in. Being a part of someone’s transformative journey from recovery to employment has been profoundly rewarding, both personally and professionally. ~Roseann Lovato, QRP
* I strongly believe this population deserves additional support and services. The Department has never offered services quite like this before, and I think the idea is so inventive and inspiring. I wanted to be part of a team that removes stigma and helps pave pathways. I come from a family in recovery, so I have a personal understanding of the struggle it takes to overcome and become successful. Best decision I ever made was to join this team. I have learned more in this last year about mental health and recovery- and see how much more is needed for this population.  ~Monday Lewis, Program Analyst
* I do this work for my family members and friends who have struggled with addictions. Every person who is struggling with substance use is someone’s son or daughter, mother or father, cousin, or friend. When helping my clients, I always try to think about the person underneath the pain. I hold hope when for them when they have none. It’s an honor to be part of this project. ~Topher Henley, QRP

## Slide 17: Questions

# Appendix E – Voice Options Program Presentation

## Slide 1: Voice Options Program

* Department of Rehabilitation
* State Rehabilitation Council Presentation
* September 11, 2024

## Slide 2: Overview

* Timeline
* Background
* Grantees/Providers
* Eligibility
* Outcomes
* Moving Forward
* Questions

## Slide 3: Background

* Partnership with the California Public Utilities Commission (CPUC), Deaf and Disabled Telecommunications Program (DDTP)
* The Voice Options Program provides eligible Californians who are unable to speak or who have difficulty speaking, the ability to speak with a speech-generating long-term device (Apple iPad).
* Program Goals
  + Ensure full and equal telephone communications access for Californians with disabilities.
  + Serve 1,260 Californians with speech-disabilities a speech-generating long-term device

## Slide 4: Timeline

* 2017: Voice Options Program Initiated by the CPUC
* 2020: Entered into an interagency agreement with the CPUC and DOR to distribute speech-generating devices pilot program
* 2023: CPUC rulemaking adopted the Voice Options Program as a permanent part of the DDTP
* 2024: VOP is operating as a permanent program

## Slide 5: Voice Options Program

* Establish Grant Agreements with 28 grantees
  + 17 grantees are Independent Living Centers.
    - ILCs provide independent living services for people with disabilities
  + 11 grantees are small businesses such as speech therapy businesses or individual speech language pathologists
* Ensure Statewide Coverage
  + 10 Regions in California
    - Ensure there are providers in each region
    - Regional process improves overall access to Voice Options Program
  + Due to strong demand of the program, each month, providers are given an allocation of long-term devices

## Slide 6: Eligibility

* Californians with verified speech or language disabilities with the goal of increasing their ability to communicate independently
* Consumers can be referred or recommended to a Voice Options Program from a clinician or approved specialist such as a Speech language pathologist, developmental pediatrician, family physician, physician assistant, or rehabilitation counselor.

## Slide 7: Roles and Responsibilities - Grantees

* Identify eligible consumers who have a speech or language disability, have difficulty speaking, and/or cannot speak
* Provide VOP demonstrations, education, and training for each selected consumer
* Work with consumers to identify one or more of six speech-generating software applications that will work best for them, given their specific speech or language disability.
* Provide the consumer with a long-term device (Apple iPad) with the speech-generating application(s)
* Fulfill reporting requirements

## Slide 8: Eligible Expenses

* Program Implementation (new grantees) $3,500 (one-time)
  + Staff training on iPad and applications
  + Provide outreach and assist with start up costs
* Long-term Device Expenses
  + Up to $1500.00
  + Purchase of a new iPad
  + Speech Application Cost
  + Assistive Technology device equipment
* Staff Costs
  + Up to $1,000 for staff time and travel dedicated to providing program services

## Slide 9: Roles and Responsibilities - DOR Staff

* Process funding requests and maintain waitlists
* Process invoices
* Provide grant administration
* Ensure compliance and monitoring
* Provide a monthly report of outcomes to providers
* Conduct quarterly provider trainings
* Report out to the CPUC

## Slide 10: Outcomes – Part 1

* Since July 2020, the Voice Options Program has served 3,617 individuals
* Referral Sources
  + 58% Speech Language Pathologists
  + 16% Regional Center
  + 9% Medical Providers
  + 5% Decline to State
  + 4% Family and Friends
  + 4% Other
  + 2% Independent Living Centers

## Slide 11: Outcomes – Part 2

Disability Type

* 75% Autism
* 9% Developmental Disability
* 7% Speech Delay
* 4% Apraxia
* 4% Cerebral Palsy
* 2% Other

Gender

* 67% Male
* 32% Female
* 1% Decline to State

## Slide 12: Outcomes – Part 3

Age

* 72% Age 0 to 6
* 14% Age 7 to 17
* 7% Age 18 to 22
* 4% Age 30 to 39
* 2% Age 23 to 29
* 2% Age 60 or Older

## Slide 13: Outcomes – Part 4

* Race/Ethnicity
  + 51% Hispanic/Latinx
  + 28% Caucasian/White
  + 5% African American/Black
  + 5% Asian/Pacific Islander
  + 5% Southeast Asian
  + 4% Other
  + 2% Decline to state
* Average Cost per long-term device and staff time $1,848.30

## Slide 14: Program Impacts

* Provides a voice for individuals
* Improved ability to communicate
* Improved language development
* Individualized options in applications in a portable device
* Improved mental and emotional wellbeing
* Greater independence and self-advocacy

## Slide 15: Moving Forward

* Increase communication to VOP grantees
  + Implementation of office hours after fully staffed
* Increase outreach and marketing to over 18 years old population
* Explore other long-term devices available such as Android
* Streamline internal DOR processes

## Slide 16: Thank You and Questions

Voice Options Program

<https://www.dor.ca.gov/Home/VoiceOptions>

916.558.5395 [VoiceOptions@dor.ca.gov](mailto:VoiceOptions@dor.ca.gov)

# Appendix F – Benefits Planning Report Presentation

## Slide 1 – Why is Report Needed?

* Lots of anecdotes, everyone has a personal story
* Don’t have data and information together to describe what people with disabilities and families go through
* Look at it systematically and from cross-programs because people with disabilities are served from multiple doors.
* All people with disabilities, regardless of disability, have similar issues with managing benefits and employment
* Income and asset eligibility for various programs become barriers to employment

## Slide 2 – Road to Benefits Planning

* Began with SRC conversation in winter of 2022
* Workgroup met between March 2023 and July 2024
  + Departmental representatives – DOR, DDS, and EDD
  + CalABLE Act Board
  + The California Behavioral Health Planning Council
  + The California Commission on Aging
  + The State Council on Developmental Disabilities
  + The State Rehabilitation Council
  + The State Independent Living Council
  + Disability Rights California

## Slide 3 – Topic Areas of the Report

* Social Security Administration
* Benefits Planning Infrastructure
* Health Care
* Long Term Care Services and Supports

## Slide 4 – Goals of Report

* Examine how the State of California can develop a consistent and integrated benefits planning structure to 1) assist people with disabilities in multiple programs by providing linkages to benefits planners and 2) provide consistent messaging and information to people with disabilities on how to manage benefits and avoid overpayments while employed.
* Highlight how the various income and asset eligibility affects people with disabilities and their employment decisions, focusing on health care and long-term services and supports.
* Make policy recommendations to the Health and Human Services Agency and Labor and Workforce Development Agency Secretaries in these areas.

## Slide 5 – Social Security Administration Recommendations

* Develop a more robust partnership with the Social Security Administration (SSA) and support efforts to streamline work incentives processes for Supplemental Security Income (SSI) and Social Security Disability Insurance (SSD) beneficiaries, so overpayments do not occur.
* Create outreach strategies to educate people with disabilities on overpayments and work incentives.
* Develop a policy for state programs to increase general resources provided on benefits planning to create messaging that SSI and SSDI beneficiaries are employable.
* Increase collaboration and linkages between the Disability Determination Services, located at the California Department of Social Services, and California’s disability related programs.

## Slide 6 – Benefits Planning Infrastructure Recommendations

* Create integrated strategies to increase benefits planning services and develop “no wrong door” approaches to benefits planning.
* Develop 1) policies for cross-training of frontline staff within workforce and health and human services programs on work incentives, 2) policies to incorporate benefits planning into contracts and written agreements, 3) policies to incorporate how beneficiaries can manage benefits and employment into all human services programs, both disability and mainstream programs.
* Invest funds to ensure tools, such as the California Disability Benefits (DB) 101 platform continue to be available to Californians with disabilities.
* Develop career advancement opportunities for benefits planners.
* Launch and sustain a marketing and outreach campaign about benefits planning to increase awareness of work incentives. This will lead to engaging individuals through childhood education, postsecondary transitions, career development, and retirement planning.

## Slide 7 – Health Care Recommendations

* Collaborate with disability-related stakeholders to improve the awareness of the 250% Working Disabled Program for people with disabilities.
* Eliminate the income eligibility requirement for California’s 250% Working Disabled Program, helping people with disabilities obtain competitive integrated employment without losing access to health care and critical long-term support services.
* Data on disability should be incorporated into existing reports for the Medi-Cal programs.

## Slide 8 – Long Term Services and Supports Recommendations

* Develop a comprehensive and easily navigated long-term services and supports system for all Californians, including people with disabilities.
* Eliminate income eligibility levels to allow access to long-term services and supports to support employment.
* Data by disability type should be collected and incorporated into existing reports for the In-Home Supportive Services program.

## Slide 9 – Next Steps

* CCEPD approved
* Submit to lead departments, DOR and EDD, by end of September or beginning of October
* Begins informal process; then, we submit to Agency Secretaries
* Once shared with Agency Secretaries, we will share report with other groups.

## Slide 10 – Our Request to SRC

* Support recommendations and report
* When recommendations and report are shared with Agency Secretaries, help us with sharing reports to various groups.

# Appendix G – New State Plan Priorities and Goals

## Slide 1: State Plan 2024-2027

* SRC Presentation:
* Thursday, September 12, 2024

## Slide 2: State Plan Background

* Sections 101(a)(15) and (23) of the Rehabilitation Act require VR agencies to establish the State's goals and priorities for implementing the VR and Supported Employment programs.
* The goals and priorities are based on:
  + The most recent Comprehensive Statewide Needs Assessment (CSNA), including any updates
  + The State’s performance under the performance accountability measures of section 116 of WIOA
  + Other available information on the operation and effectiveness of the VR program, including any reports received from the SRC and findings and recommendations from monitoring activities conducted under section 107 of the Rehabilitation Act.

## Slide 3: Timeline

Program Year Quarters:

* Quarter 1: July 1 – September 30
* Quarter 2: October 1 – December 31
* Quarter 3: January 1 – March 31
* Quarter 4: April 1 – June 30

Next State Plan Two-Year Modification draft due December 2025. Will go into effect July 1, 2026.

## Slide 4: New Goals 2024 – 2027

## Slide 5: Goal 1: Increase the unsubsidized employment rate of participants during the second and fourth quarter after exit from program.

Objective 1.1: The unsubsidized employment rate of participants during their second quarter after exit from program will increase from the 51.6% rate in PY 2022 to no less than 55% by PY 2025.

Objective 1.2: The unsubsidized employment rate of participants during the fourth quarter after exit from program will increase from the 49.7% rate in PY 2022 to no less than 53% by PY 2025.

## Slide 6: Goal 2: Support increased work-based learning including intermediate employment, career technical education and training, and post-secondary education for all CDOR participants receiving VR services.

Objective 2.1: The Credential Attainment rate by CDOR program participants will increase from the PY 2022 rate of 43.5% to no less than 48% by PY 2025.

Objective 2.2: CDOR will increase the Measurable Skills Gain (MSG) rate for CDOR participants from the PY 2022 rate of 28.6% to no less than 40% by PY 2025.

## Slide 7: Goal 3: Expand and improve VR services to those who have been underserved and underrepresented in the VR program.

Objective 3.1: Consumers with Behavioral Health (BH) disabilities who are Black or African American or Hispanic will have second quarter median earnings no less than $7,000 per quarter and be no less than the overall median earnings of all CDOR consumers with BH disabilities by PY 2024 and will increase to no less than $7,200 and be no less than the overall median earnings of all CDOR consumers with BH disabilities by PY 2025.

* Median earnings as of Q3 of PY 2022 were: $6,340 for Black/African American (AA); $6,586 for Hispanic; and $6,759 for all individuals with BH disabilities who exited the program.

## Slide 8: Goal 4: Provide effective VR services with quality IPE developments consistent with in-demand workforce needs that lead to a career track offering sustainable living wages.

Objective 4.1: The percentage of consumer IPE goals for local/regional, high-wage, in-demand occupations will increase from the current 19% of all new IPE goals to at least 30% of all IPE goals for plans developed and approved during PY 2025. (IPE goals matching the EDD labor market information regional report of the 25 highest demand occupations making, on average, no less than $22/hour.)

## Slide 9: Goal 5: Support businesses in California to employ more individuals with disabilities.

Objective 5.1: For PY 2024 and PY 2025, develop, implement, and deliver services to at least 100 new, unduplicated businesses annually.

## Slide 10: Goal 6: Improve California state government employers’ parity rate for hiring and promotion of people with disabilities.

Objective 6.1: CDOR will provide direct hiring services and supports to no less than 30 unduplicated State Departments, Offices, or Agencies by the end of PY 2025.

## Slide 11: Goal 7: Increase the number of students with disabilities, ages 16-21, who receive high quality Pre-Employment Transition Services, also known as CDOR Student Services.

Objective 7.1: CDOR will increase the number of students with disabilities annually served by 35% from the 46,000 served in PY 2022 to no less than 62,100 in PY 2025.

## Slide 12: Goal 8: Increase the percentage of students with disabilities receiving CDOR Student Services who go on to receive VR services.

Objective 8.1: CDOR will increase the percentage of students enrolled in CDOR Student Services who go on to receive an IPE for VR services from 19.5% in PY 2022 to no less than 35% during PY 2025.

## Slide 13: Performance Measures

| **Performance Indicator** | **PY 2024 Expected Level** | **PY 2024 Negotiated Level** | **PY 2025 Expected Level** | **PY 2025 Negotiated Level** |
| --- | --- | --- | --- | --- |
| Employment (Second Quarter After Exit) | 52.0% | 52.0% | 55.0% | 55.0% |
| Employment (Fourth Quarter After Exit) | 50.0% | 50.0% | 53.0% | 53.0% |
| Median Earnings (Second Quarter After Exit) | $7,000 | $7,000 | $7,200 | $7,200 |
| Credential Attainment Rate | 42.0% | 44.5% | 48.0% | 48.0% |
| Measurable Skill Gains | 37.0% | 37.0% | 40.0% | 40.0% |
| Effectiveness in Serving Employers | Not Applicable | Not Applicable | Not Applicable | Not Applicable |

## Slide 14: Contact

Policy Unit Peter Frangel – Manager [peter.frangel@dor.ca.gov](mailto:peter.frangel@dor.ca.gov)

Antoinette deBoisblanc – AGPA [antoinette.deboisblanc@dor.ca.gov](mailto:antoinette.deboisblanc@dor.ca.gov)

# Appendix H – State Independent Living Council Presentation

## Slide 1: **State Independent Living Council (SILC) California**

California State Independent Living Council (SILC) updates

September 2024

## Slide 2: **State Independent Living Council (SILC) California**

SILC Background

* Purpose and structure of the SILC
  + functions, membership, and unique aspects of the California SILC

Overview of the CA State Plan for Independent Living (SPIL)

* Purpose of the SPIL
* Approval process
* Significance of the CA SPIL's approval and signatories

SPIL Goals and Funding Updates

* SPIL Goals and funding allocations

## Slide 3: State Plan for Independent Living 2025-2027

* The 2025-2027 SPIL is in effect October 1, 2024-September 30, 2027.
* The SPIL is the guiding document for the States Independent Living Services. The network collaboratively agrees to work on the goals and objectives within the SPIL over the 3-year period.
* The SPIL contains 3 major goals and many smaller objectives relating to those goals.
  + Goal 1: Systems Change Advocacy
  + Goal 2: Transition and Diversion
  + Goal 3: Funding

## Slide 4: Questions/Comments

Thank you!

Shannon Coe, SRC and SILC Member

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