

AGENDA
INLAND COUNTIES REGIONAL CENTER, INC.
BOARD OF TRUSTEES MEETING
MONDAY, July 11, 2022
Meeting: 4:00 p.m. to 6:00 p.m.
Only Via Live Stream at [Inlandrc.org/live](https://inlandrc.org/live)

Call to Order/Ms. Estrada

Minutes of May 9, 2022 Annual Board Meeting/Ms. Estrada Action

Public Input: Comments limited to 3 minutes per person. Action may not be taken on any item that is not on the Agenda. ***Due to the existing COVID-19 State of Emergency, all requests for public comment must be submitted in writing prior to the meeting by using the submission form found at inlandrc.org/live. In order to protect the rights of our consumers, comments should not include personal consumer information. If you have a specific issue or comment, contact your CSC or email your comments to Btrustees@inlandrc.org.***

Executive Director's Report/Ms. Johnson Info

Director's Reports/Directors Info

Committee Reports (Written Reports)

- | | |
|--|------|
| 1) Another Way/Ms. Gonzales | Info |
| 2) Executive Committee/Ms. Estrada | Info |
| 3) Legislative Committee/Ms. Cummings | Info |
| 4) Master Trust Committee/Ms. Miller | Info |
| 5) Vendor Advisory Committee/Ms. Stewart | Info |

Old Business:

- | | |
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| 1) Salary Schedule Corrections/Ms. Steuwer | Action |
|--|--------|

New Business

- | | |
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| 1) Approval of New Board Members/Ms. Lara | Action |
| 2) POS Policy/Mr. Toms | Action |
| 3) Bank Signatories for New Board Officers/Ms. Steuwer | Action |

- 4) Employee Health Benefits for Plan Year 10/1/2022/Ms. Steuwer
- 5) Master Trust Investment Objectives and Policies/Mr. Beckett

Action
Action

Trustee Input

Executive Session

- 1) Legal Matters (In accordance with Welfare & Institutions Code Section 4663(a)(5)
- 2) Employee Salaries and Benefits (In accordance with Welfare & Institutions Code Section 4663(a)(3))

Next Meeting Date: September 12, 2022

MINUTES OF May 9, 2022
Inland Counties Regional Center, Inc.
Annual Board of Trustee Meeting

BOARD PRESENT VIA CONFERENCE CALL: Jay Connor; Carmen Estrada; Alicia Lara; Maureen O'Connell
Cameron Page; Rene Rojo; Gizelle Siojo; Teri Smith; Joshua Souder; April Stewart; Alva Stewart

BOARD MEMBERS ABSENT: Kiana Buffington; Eric Naranjo

BOARD FACILITATOR: Robyn Souder

DIRECTORS PRESENT VIA CONFERENCE CALL: Steve Beckett; Felipe Garcia; Lavinia Johnson; Don Meza;
Merissa Steuwer; Vince Toms; Treva Webster

STAFF PRESENT VIA CONFERENCE CALL: Kurtis Franklin; Claudia Mora

GUEST PRESENT VIA CONFERENCE CALL: John Fitzgerald, Glass Onion PMC, LLC

RECORDING SECRETARY: Sandra Guzman

CALL TO ORDER: Meeting was called to order by Mr. Page at 4:00 pm.

MINUTES OF March 14, 2022 BOARD MEETING: 1. Motion made to approve the minutes of the March 14, 2022 Board Meeting as presented M/S/C Rojo/Connor.

PUBLIC COMMENT: From Mr. Greg Damewood

Two Issues please:

1 - Many in facilities are in their room or bed up to 20 hours a day. The way this can be calculated is being encouraged or put in bed by 6PM and up at **7AM alone is 13 hours.**

3 meals and a shower maybe 2-3 or 4 hours out of bed and bedroom leaving 20 hours in bed or bedroom alone. Can this be surveyed by some means?? I have made phone calls to someone I know very well and in bed by 6PM with no options, so it seems apparent that residential staff is not providing motivation or opportunity to be up and about enjoying life. Joint activities, hobbies, crafts, games and more at joint time to promote community.

2 - I have heard the Day Programs are open 2 days a week. How can we promote the use of this option? I have heard that Day Programs are going to fully reopen July 1, 2022, is this true? How can we promote residents getting back out into the community??

I attended a ZOOM meeting where it was presented that **abuse in general is way up** - somewhat due to isolation - this does make sense. Please let the community know what the IRC is going to do about Community Care Facilities especially at higher levels like 4I that is paid at least 8 thousand a month to provide activities, medical care and more.

Being in bed is as bad as sitting which is seen as the new smoking -- there are many articles about the ills of being inactive ---

- Sitting or lying down for too long increases your risk of chronic health problems, such as heart disease, diabetes and some cancers.
- Too much sitting can also be bad for your mental health.
- Being active is not as hard as you think. There are lots of simple ways to include some physical activity in your day

[The dangers of sitting: why sitting is the new smoking - Better Health Channel](#)



The dangers of sitting: why sitting is ...

How would anyone want their loved one cared for in this times of working from homes and less interfacing with the services to be provided.

Thanks for your time and care -

Greg Damewood

EXECUTIVE DIRECTOR'S REPORT: Ms. Johnson reported the following: 1. As of April 1, 2022, IRC serves 43,258 consumers. 2. IRC currently has 765 employees which includes 505 Service Coordinators. 3. IRC continues to disperse PPE to our community vendors and to our staff. 4. IRC plans to open to the public in July. Staff will continue to work remotely and come in as needed. 5. Onsite testing continues in our San Bernardino and Riverside offices. 6. Salary adjustments will be presented later on but wanted to address the questions regarding the Salary Review Committee. The Salary Review Committee consisted of Board Members Cameron Page and Josh Souder, staff members Ben Cheng, Luciano Paz, Maria Harkin, Merissa Steuwer, Steve Beckett and Lavinia Johnson. The purpose of the committee was to address minimum wage and compression issues as well as review of the equity of the salary schedule for all categories of employees. The committee took a global view of the salary schedule and did not put one category or group of employees against another. Salaries were reviewed with comparable positions at other regional centers, cities and counties. The committee did not consider the person in the current position but rather the duties and responsibilities of the positions. Ms. Johnson thanked the committee for their dedication and transparency on this project.

DIRECTOR'S REPORT: Written reports were submitted. No questions from the Board.

COMMITTEE REPORTS:

- 1) **ANOTHER WAY:** Ms. Gonzales submitted a written report. There were no questions from the Board.
- 2) **EXECUTIVE COMMITTEE:** The minutes from the April and May meetings were submitted. No questions from the Board.
- 3) **LEGISLATIVE COMMITTEE:** Ms. Cummings submitted a written report. No questions from the Board.

- 4) **MASTER TRUST COMMITTEE:** Ms. Miller submitted a written report. No questions from the Board.
- 5) **VENDOR ADVISORY COMMITTEE:** Ms. April Stewart submitted a summary from the March and April VAC meetings. No questions from the Board.

OLD BUSINESS: None

NEW BUSINESS:

1. **AD HOC NOMINATIONS COMMITTEE:** Mr. Page announced the need to create an Ad-hoc Nominations Committee to fill the two upcoming vacancies. Mr. Connor and Mr. Souder volunteered to serve on the committee. We need one additional Board Member to serve on the committee. The motion will be tabled until a third member volunteers. The Board was instructed to inform Sandra Guzman if they would like to serve on committee. **2. Motion made to table this action until a third member volunteers M/S/C Rojo/Connor.**
2. **APPROVAL OF BOARD OFFICERS:** Mr. Page opened the floor to accept any new nominations. Hearing none, Mr. Page announced the following nominations: Ms. Estrada, Chair; Ms. O'Connell, Vice-Chair; Ms. Lara, Secretary; Mr. Connor, Member-at-Large. **3. Motion to approve the slate of officers as presented M/S/C Souder/Rojo.**
3. **INDEPENDENT COUNSEL FOR BOARD:** Mr. Page shared that the Executive Committee had a meeting with DDS regarding their concern as to where the Board obtains their legal advice. It is the Executive Committee's recommendation that the Board seeks to hire independent counsel for the Board in the chance they need legal advice. The Board will form an Ad-hoc Committee to explore hiring independent counsel in order to comply with W&I Code 4625.6. **4. Motion made to form an Ad-hoc Committee to seek legal counsel for the Board M/S/C Rojo/Souder.** Once the committee is formed, the committee will meet with management.
4. **\$250,000 CONTRACTS:** Mr. Toms reviewed 52 vendor contracts. 24 Supported Living Skills, 2 Education related; 1 Family Home Agency; 1 Pharmaceutical Services; 8 Specialized Assessment; 10 Clinical Psychologist Services; 2 Physician Services; 4 LVN/RN; 1 Psychiatric Services. These contracts were reviewed by the Executive Committee. It is the committee's recommendation that the Board approve these contracts as presented. **5. Motion made to approve the 52 contracts as presented M/S/C Connor/Souder. Ms. April Stewart abstained from voting.**
5. **2020/21 PURCHASE OF SERVICE DISPARITY REPORT:** Mr. Toms presented the 2020/21 Purchase of Service Disparity Report and thanked CJ Cook and Lillian Garnica for all their hard work in putting this report together. **6. Motion made to approve IRC's 2020/21 Purchase of Service Disparity Report as presented M/S/C Rojo/Connor.**
6. **SALARY SCHEDULE ADJUSTMENT:** Ms. Steuwer shared that the Board approved the first round of adjustment in March addressing the minimum wage and salary compression. A lot of work went into this project. The Committee's overall goal was to be fair to all employees and to recognize the value of each position and compensate it appropriately. Prior to this adjustment, staff have received lots of incentives such as \$500 in June, 2021, \$750 in December, 2021, \$200 if you received your booster, Covid personal holiday and another cash incentive of

approximately \$1,100 coming in June, 2022. Also would like to point out IRC offers 16 holidays in a calendar year which is attached to one's salary. Before asking for the Board's approval, Ms. Steuwer would like to add 3 positions that were omitted from the list: Systems of Care Coordinator, 1:25 Specialized Caseload Service Coordinator and 1:40 Enhanced Service Coordinator. **7. Motion made to include the 3 positions that were omitted to the salary schedule M/S/C Rojo/Page.** Ms. April Stewart abstained from voting. **8. Motion made to approve the salary schedule as presented effective July 1, 2022 Rojo/Souder.** Ms. April Stewart abstained from voting.

- 7. COST OF LIVING ADJUSTMENT:** Ms. Steuwer announced after careful consideration and reviewing budget projections, she is seeking the Board's approval in awarding staff a 3% COLA effective on the June 3 pay period. **9. Motion made to approve a 3% COLA effective on the June 3 pay period M/S/C Souder/Rojo.** Ms. April Stewart abstained from voting.

- 8. CYBER SECURITY CONTRACT:** Ms. Steuwer shared due to remote working, IRC has had to upgrade some of our system. Kurtis Franklin will explain in more detail. Mr. Franklin shared that it has been a tough couple of years with cyber attacks. The cost of a breach is very costly. In 2021 the average cost was about 4 million. At IRC, a variety of things are in place to prevent such a breach therefore the need to increase our visibility in cyber security is crucial. Artic Wolf provides 24/7 overview. IRC would like to partner with them and enter into a 3-year contract with them. The cost would be \$145,000 per year for 3 years. **10. Motion made to approve entering into a 3-year contract with Artic Wolf M/S/C Rojo/Souder.**

- 9. BANK SIGNATORY:** Ms. Steuwer stated with Mr. Page terming from the Board and as Board Chair, we need to set up the new bank signatories. This process takes about 3-4 months. Ms. Steuwer is requesting the Board's approval in keeping Mr. Page as bank signatory until the new signatory is in place. **11. Motion made to keep Mr. Page as signatory until the new Chair signature is in place M/S/C Connor/Rojo.**

TRUSTEE INPUT:

Mr. Rojo stated that with his past board experience he is more than willing to help anyone if they need some help

Ms. Alva Stewart stated it was truly an honor to serve on the Board and appreciates everyone she has encountered. This experience has truly been a blessing.

Mr. Page thanked IRC staff and Board for the opportunity to serve on the Board. It was a pleasure and honor. Grateful for being given the opportunity to work with ARCA as well. Thank you.

Mr. Page adjourned the meeting at 5:02 p.m. to go into Executive Session. Executive Session was called to order at 5:04 p.m.

The Board reconvened at 5:06 p.m. The Board did not take any action during Executive Session. **12. Motion made to adjourn the meeting at 5:07 p.m. M/S/C Rojo/Souder.**

Sincerely,

Carmen Estrada
Board Secretary

Sandra Guzman
Assistant Secretary

MOTIONS FOR THE MAY 9, 2022 BOARD OF TRUSTEES MEETING

- 1. Motion made to approve the minutes of the March 14, 2022 Board Meeting as presented M/S/C Rojo/Connor.**
- 2. Motion made to table this action until a third member volunteers M/S/C Rojo/Connor.**
- 3. Motion to approve the slate of officers as presented M/S/C Souder/Rojo.**
- 4. Motion made to form an Ad-hoc Committee to seek legal counsel for the Board M/S/C Rojo/Souder.**
- 5. Motion made to approve the 52 contracts as presented M/S/C Connor/Souder. Ms. April Stewart abstained from voting.**
- 6. Motion made to approve IRC's 2020/21 Purchase of Service Disparity Report as presented M/S/C Rojo/Connor.**
- 7. Motion made to include the 3 positions that were omitted to the salary schedule M/S/C Rojo/Page. Ms. April Stewart abstained from voting.**
- 8. Motion made to approve the salary schedule as presented effective July 1, 2022 Rojo/Souder. Ms. April Stewart abstained from voting.**
- 9. Motion made to approve a 3% COLA effective on the June 3 pay period M/S/C Souder/Rojo. Ms. April Stewart abstained from voting.**
- 10. Motion made to approve entering into a 3-year contract with Artic Wolf M/S/C Rojo/Souder.**
- 11. Motion made to keep Mr. Page as signatory until the new Chair signature is in place M/S/C Connor/Rojo.**
- 12. Motion made to adjourn the meeting at 5:07 p.m. M/S/C Rojo/Souder.**

Director Adult Services Report

July 2022

Respectfully submitted by Don Meza

Adult Services Team Update: The adult services team has worked remotely since the state of emergency was declared by Governor Newsom on 3/04/2020. The case management teams have been completing in-person visits with consumers in a conscientious and safe manner. The focus of in-person visits has been for consumers residing in Board and Care and Specialized Facilities, in Skilled Nursing Facilities, and for independent consumers with Supported Living services. DDS has extended directives to provide service delivery to consumers and we are allowed some flexibility in completing face to face vs. virtual visits as COVID infection rates fluctuate in the community. The directives for Alternative Services by non-residential vendors (day programs, habilitation, and transportation) remain in place but we expect an end to these services effective June 30, 2022. However, we expect that some of the DDS directives related to virtual and remote meetings will be continued "ongoing". In Adult services there are currently 13 teams with approximately 200 service coordinators that cover the two-county catchment. With the new 21/22 budget we will be developing several new positions including a "deaf specialist", 2 "participant choice specialists", and 10 "enhanced caseload services" coordinators.

Federal Programs/Medicaid Waiver (MW): A Federal Programs audit was conducted at IRC the first two weeks of October 2021. The MW team had been preparing for several months to accommodate the fully virtual audit. This audit was completed virtually by auditors from DDS and DHS. In addition to a review of the documentation, the audit process included staff, consumer, and vendor interviews. A virtual cloud platform was created by Kurtis from our IT team to allow the auditors access to the documents. The Case Management, Resource, and Waiver teams worked tirelessly to get the documentation in order. An exit interview was conducted on October 18th, and the auditors shared their initial results. The auditors praised IRC for having excellent documentation and excellent organization of the Waiver eligible cases.

As of May 2022, IRC serves 15,529 active Medicaid Waiver enrolled consumers. The review process and reaccreditation of Waiver cases continues to be challenging in the current remote working model. Regardless of the challenges of COVID 19, the MW staff continues to add "Deeming" cases. DDS will continue to provide the accounting of 1915i cases directly to CMS.

Self Determination (SD): The SD Advisory Committee last met via "ZOOM" on March 24, 2022. IRC currently has 73 consumers active in the Self Determination program and 9 consumers who are in pending status. There are other consumers who are in the initial process of becoming active in the Self Determination program. An "orientation" to Self Determination remains a requirement, and IRC continues to offer Remote/Virtual SDP orientations with various dates scheduled. There has been a very good turnout for the virtual SDP orientations, we have had 50 to 60 individuals sign up for every session. As a regional center we are advancing forward with self-determination. We recently hired 2 "Participant Choice Specialists" to provide support and guidance to consumers and staff. These are new positions created with guidance from DDS to help facilitate the process of initiation into the Self Determination Program



**Intake, Early Start, Clinical Services and
The Early Start Family Resource Network
REPORT
May-June 2022**

Early Start

The Early Start Program has a new Program Manager to replace Edyth Gallardo, who is now our Early Start Federal Compliance Specialist. The new Program Manager is Cristian Vargas. Cristian has solid history at IRC working in the Medicaid Waiver Unit, an adult age unit, and in Early Start as an Infant Service Coordinator. Welcome Cristian Vargas!

There will be many changes in Early Start as soon as the California State Budget is finalized by June 30, 2022.

Clinical Services

We have made some progress towards hiring additional Clinical Psychologists. I will share the details as soon as they have completed the hiring process. We need these positions to keep up with the increasing demands of all eligibility assessments which now include assessing for Provisional Eligibility, Early Start to Lanterman Eligibility, and Intake to Lanterman Eligibility. There is a very high demand for Clinical Psychologists so it can be challenging to recruit and hire for these important positions.

Intake

Our intake numbers continue to rise and even with two new Senior Intake Counselor positions, intake staff must work extremely hard not to fall behind with meeting the mandated timelines.

Family Resource Network (FRN)

The Statewide Family Resource Network is very busy with several large projects which ultimately will assist families with understanding and access to information about Regional Center access and processes. This will be very helpful for the individuals we serve to receive the services they need.



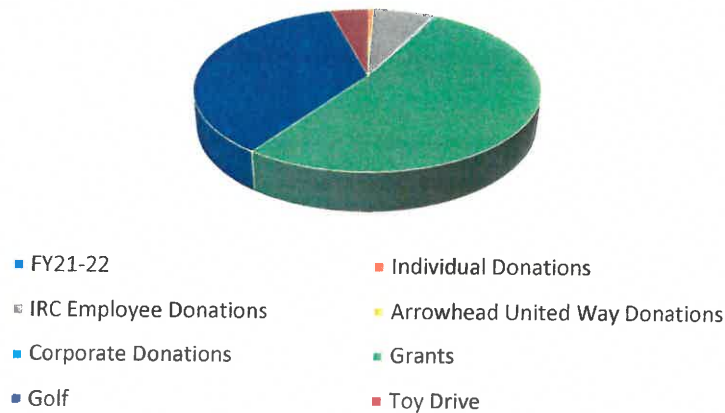
Inland Regional Center Board Report
Submitted by Andrea Gonzales, Another Way Coordinator
Date: June 24, 2022

To: The Board of Trustees

I. Fiscal Year End FY 21-22 through June 24th, 2022

A. Funds Raised – Income \$331,117.63
Expenses \$279,731.28
Net Operating \$51,386.35
Other Income \$15,444.02
Net Income \$66,830.37

**Breakdown of Funds Raised Categories
FY21-22**



II. Golf Tournament (September 16th and 17th) – Temecula Creek Inn

- A. Save-the-Dates and Invitational Brochures have been sent out.
- B. Sponsors committing. We have \$86,000 in committed sponsorships to date
- C. Rooms book up quickly so please let us know if you plan on attending
- D. Board and Employee rate \$175 per golfer.

III. Requests for Assistance

- A. Requests have been slow throughout the pandemic
 - i. We attribute much of this to the extra government assistance that has been provided in the form of stimulus checks and child tax credits. There was also the pause on evictions which meant less people needed rental assistance.
- B. Past three months requests are slowly picking up.

IV. Backpack Event (July 30th)

- A. Backpack giveaway will be held in IRC's back parking lot
- B. Received 112 referrals from case managers
 - i. Must be low-income to qualify for backpack
 - ii. Siblings of consumers are included in giveaway
- C. Gift cards for clothing will be purchased using funds from Carpenter grant.
- D. Backpacks were donated by Inland Respite

V. Training session for Advisory Committee – Training will take place on July 15th and 16th.

- A. Training will encompass adapting to change and social media.
- B. Training is taking place at the Hyatt Long Beach.

VI. Toy Drive – Tentative date is December 7th, 2022.

- A. The event will take place at Club Events Center in San Bernardino, pending COVID is not an issue.

VII. Grants

- A. *Pending grants*: \$5000; Stater Brothers for food support - \$5000; and The Annette Williams Charitable Foundation (new) - \$5,000 general operating support. Annenberg-\$50,000 if LOI is accepted/program support. If awarded, funds for these grants will arrive in FY22-23.
- B. *Denied Grants*: The Lawrence Foundation (\$5000)
- C. *Current grants*: Cal Wellness (\$76,296.47); Kaiser (\$69,040.00); IECF (\$3,333.29); Carpenter (\$38,924.39).
- D. *Grant Reports submitted*: Annenberg report submitted in March and accepted.
- E. *Grant Extension submitted*: Kaiser approved a grant extension through March of 2023.

INLAND REGIONAL CENTER

**Board of Trustees
Executive Committee Meeting**

May 18, 2022

11:00 a.m.

EXECUTIVE COMMITTEE: Cameron Page; Alva Stewart; Josh Souder

STAFF/EX OFFICIO: Lavinia Johnson; Steve Beckett; Merissa Steuwer

RECORDING SECRETARY: Sandra Guzman, Executive Assistant

1. **Independent Counsel:** Cameron sent letter to DDS stating changes and actions taken by the Board. An Ad-hoc committee will be formed so the Board can approve hiring independent counsel or the Executive Committee can serve as the Ad-hoc committee. Consider having a yearly retainer vs contract. Funds would come from the Board's allocated budget. Independent Counsel would only come in when needed.
2. **Board Applications:** The Board received two applications. Josh and Jay are on the Ad-hoc Nominations Committee but we need one more member before we can interview. We will reach out to Teri Smith or Alicia Lara to see if they would like to be on the committee.
3. **Master Trust Investment Portfolio –** Merissa reviewed the Master Trust Investment Portfolio for the month of April.
4. **Update on Meeting with Managers:** Letter from managers that was sent to Board was discussed. Management met with representatives from each department. There was a lot of dialogue between staff and management. Managers are getting paid well for the industry they are in. Conversation became heated at some point. Overall, the meeting went as well as expected. Management explained to representatives who was on committee, the amount of time and work that took place and all positions were taken into consideration. When it comes to money, things can get disrespectful and ugly fast. Some representatives stated it was not about money, it was about being transparent. Some even felt they should have been included in the process however, that's the Executive Management's team job. At the end of the day, they have to respect the decisions that are being made for the good of the entire agency. Basically, everyone has to agree to disagree.

Next Meeting: June 15, 2022

INLAND REGIONAL CENTER

**Board of Trustees
Executive Committee Meeting**

June 15, 2022

11:00 a.m.

EXECUTIVE COMMITTEE PRESENT: Cameron Page; Alva Stewart; Carmen Estrada; Joshua Souder

STAFF/EX OFFICIO PRESENT: Lavinia Johnson; Merissa Steuwer; Vince Toms

RECORDING SECRETARY: Sandra Guzman, Executive Assistant

1. POS Policy: Vince Toms presented the policy & shared with the Exec Comm:
1. Respite; 2. Camp; 3. Non-Medical Therapies (Art, Dance, Equestrian, etc.), 4. Social Rec.; 5. Educational Services (services not provided by the Educational System). POS policy was vetted through the Department. Approve Motion that Exec Comm present to the full Board.
2. Nominations Committee: Recommendations motion to approve Ted Leonard and Carmela Garnica to the Board.
3. Master Trust Investment Portfolio: Merissa reviewed the Master Trust Investment portfolio for May, 2022.
4. Building the July 11, 2022, Agenda:
 - Approval of new Board members
 - POS policy (presented by Director Vince Toms)
 - Bank Signatories as New Business.
 - Board to grant authority to the Exec Comm. regarding approval of health benefits.

Next Meeting: July 20, 2022



LEGISLATIVE REPORT

June 2022

Respectfully Submitted by Jennifer Cummings
Fair Hearings and Legal Affairs



Bill	Title	ARCA Position	Bill Location
HR 3321	Credit for Caring Act – The bill supports family caregivers by offering a federal tax credit of up to \$5,000 for those who qualify.	-	Introduced 5/18/21
HR 3474; S.1858 (Federal)	Keeping All Students Safe Act – This bill would prohibit physical restraint that is life-threatening or restricts breathing, mechanical restraint, chemical restraint, and seclusion in schools that receive federal funding	-	Introduced 5/25/21
HR 3763 (Federal)	Supplemental Security Income (SSI) Restoration - Would enhance SSI program by updating general income disregard to \$123/month, adjusting the earned income disregard to \$399/month, and increasing resource limits to \$10,000/individual and \$20,000/couple.	-	Introduced 6/6/21
HR 4131; S. 2210 (Federal)	Better Care Better Jobs Act - proposes a \$400 billion investment in Medicaid home and community-based services (HCBS) to expand access to these vital services and create more and better direct care jobs.	-	Introduced 6/24/21
HR 6405 (Federal)	Marriage Equality for Disabled Adults Act - Would eliminate requirements that disabled adult children (DAC) remain unmarried in order to receive Social Security benefits and Medicare and Medicaid. Endorsed by The Arc.	-	Introduced 1/13/22
AB 13 (2-YEAR)	Personal rights: automated decision systems.		
AB 32 (2-YEAR)	Telehealth. Expands and enshrines the new telemedicine world.	Tracked by ARCA	Senate - Appropriations
AB 58 (2-YEAR)	Pupil health: suicide prevention policies and training.	Support	Senate - Health
AB 84 (2-YEAR)	Employment: COVID-19: supplemental paid sick leave.	Support	Senate - Appropriations
AB 114 (2-YEAR)	Medi-Cal benefits: rapid Whole Genome Sequencing. Adds whole genome sequencing to the list of Medi-Cal benefits.	Tracked by ARCA	Senate - Budget & Fiscal Review
AB 126 (2-YEAR)	Special education programs: Family Empowerment Centers on Disability.	Support	Senate - Appropriations
AB 129	Budget Act of 2022		
AB 154	Budget Act of 2022	Support	Senate - Education
AB 321	Childcare services: enrollment priority.	Tracked by ARCA	Senate - Budget & Fiscal Review
AB 371 (2-YEAR)	Shared mobility devices: insurance and tracking.	Tracked by ARCA	Senate - Second Reading
AB 470 (2-YEAR)	Medi-Cal: eligibility.	Tracked by ARCA	Senate - Human Services
AB 499 (2-YEAR)	Referral source for residential care facilities for the elderly: duties.	Support	Senate - Insurance
AB 552 (2-YEAR)	Integrated School-Based Behavioral Health Partnership Program.	Support	Senate - Appropriations
AB 562 (2-YEAR)	Frontline COVID-19 Provider Mental Health Resiliency Act of 2021: health care providers:	Tracked by ARCA	Senate - Inactive
AB 662 (2-YEAR)	Mental health: dispatch and response protocols: working group	Support	Senate - Health
AB 682	Planning and zoning: density bonuses: cohousing buildings.	Tracked by ARCA	Senate - Appropriations
AB 695 (2-YEAR)	Elder and dependent adults. Simplifies the definition of elder/dependent adult for APS purposes.	Support if Amended	Senate - Gov. Organization
		Support	Senate - Housing
		Support	Senate - Appropriations



LEGISLATIVE REPORT
June 2022
 Respectfully Submitted by Jennifer Cummings
 Fair Hearings and Legal Affairs



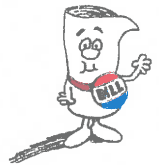
Bill	Title	ARCA Position	Bill Location
AB 813 (2-YEAR)	Developmental services: service outcome pilot project.	Support in Concept	Senate - Appropriations
AB 895 (2-YEAR)	Residential care facilities: conditions.	Tracked by ARCA	Senate - Rules
AB 967 (2-YEAR)	Special education: COVID-19 Special Education Fund.	Support	Senate - Education
AB 988 (2-YEAR)	Mental health: mobile crisis support teams: 988 crisis hotline.	Support	Senate - Gov. Organization
AB 1007 (2-YEAR)	Forced or Involuntary Sterilization Compensation Program.	Support	Senate - Appropriations
AB 1051 (2-YEAR)	Medi-Cal: specialty mental health services: foster youth.	Tracked by ARCA	Senate - Inactive
AB 1071 (2-YEAR)	Office of Emergency Services: tabletop exercises.	Support	Senate - Appropriations
AB 1355	Medi-Cal: Independent Medical Review System.	Support	Senate - Judiciary
AB 1417 (2-YEAR)	Community colleges: providers of care for individuals with developmental disabilities: model	Tracked by ARCA	Senate - Education
AB 1502 (2-YEAR)	Skilled nursing facilities. (No borrowing licenses)	Tracked by ARCA	Senate - Health
AB 1624	Budget Act of 2022	Tracked by ARCA	Assembly - Budget
AB 1630	AB-1630 Competence to stand trial: statewide application.	Tracked by ARCA	Senate - Public Safety
AB 1663	Protective proceedings. (Conservatorship reform bill)	Support if Amended	Senate - Judiciary
AB 1684	Alzheimer's disease: public awareness campaign.	Tracked by ARCA	Senate - Health
AB 1720	Community care facilities: criminal background checks.	Tracked by ARCA	Senate - Human Services
AB 1751	Workers' compensation: COVID-19: critical workers.	Tracked by ARCA	Senate - Labor/Public Empl/Ret.
AB 1809	Nursing Facility Resident Informed Consent Protection Act of 2022.	Tracked by ARCA	Assembly - Public Safety
AB 1810	Pupil health: seizure disorders.	Support	Senate - Education
AB 1900	Medi-Cal: income level for maintenance.	Support	Senate - Health
AB 1907	Long-term health care facilities: inspections.	Tracked by ARCA	Senate - Appropriations
AB 1914	Resource family approval: training.	Support	Senate - Human Services
AB 1915	Developmental services.	Tracked by ARCA	Assembly - Pending Referral
AB 1927	Director of Developmental Services: guardianship and conservatorship.	Tracked by ARCA	Assembly - Pending Referral
AB 1947	Hate crimes: law enforcement policies.	Tracked by ARCA	Senate - Public Safety
AB 1962	Telephone support services: seniors and individuals with disabilities.	Support	Assembly-Aging/Long Term Care
AB 1982	Telehealth: dental care.	Support	Senate - Health
AB 1993	Employment: COVID-19 vaccination requirements.	Tracked by ARCA	Assembly - Labor & Employment
AB 1994	Long-term supports and services.	Tracked by ARCA	Assembly - Pending Referral
AB 1995	Medi-Cal: premiums, contributions, and copayments.	Support	Senate - Health
AB 1999	Medi-Cal: behavioral health: individuals with vision loss.	Tracked by ARCA	Senate - Health
AB 2003	California Workforce Development Board: model career pathways.	Tracked by ARCA	Senate - Labor/Public Empl/Ret.
AB 2017	Evidence: hearsay: exceptions.	Support	Assembly - Public Safety
AB 2020	Mental health services: gravely disabled.	Tracked by ARCA	Assembly - Health
AB 2023	Jails: discharge plans.	Support	Senate - Public Safety



LEGISLATIVE REPORT

June 2022

Respectfully Submitted by Jennifer Cummings
Fair Hearings and Legal Affairs



Bill	Title	ARCA Position	Bill Location
AB 2036	Resource family approval: training.	Tracked by ARCA	Senate - Pending Referral
AB 2063	Density bonuses: affordable housing impact fees.	Tracked by ARCA	Assembly - Engrossing
AB 2069	California Home Health Aide Training Scholarship Act.	Support	Senate - Education
AB 2077	Medi-Cal: monthly maintenance amount: personal and incidental needs.	Support	Senate - Appropriations
AB 2079	Skilled nursing facilities: direct care spending requirement.	Tracked by ARCA	Senate - Health
AB 2145	Dental services: skilled nursing and intermediate care facilities/developmentally disabled.	Support	Senate - Second Reading
AB 2164	Disability access: funding.	Support	Senate - Gov. Organization
AB 2165	Persons with developmental disabilities.	Tracked by ARCA	Assembly - Pending Referral
AB 2216	The Qualified ABLE Program: tax-advantaged savings accounts.	Support	Senate - Gov. & Finance
AB 2249	Public postsecondary education: students with disabilities.	Tracked by ARCA	Assembly - Pending Referral
AB 2256	Office of Broadband and Digital Literacy: reports.	Tracked by ARCA	Senate - Appropriations
AB 2275	Mental health: involuntary commitment.	Tracked by ARCA	Senate - Appropriations
AB 2317	Children's psychiatric residential treatment facilities.	Support if Amended	Senate - Rules
AB 2394	Long-term services and supports.	Tracked by ARCA	Assembly-Aging/Long Term Care
AB 2402	Medi-Cal: continuous eligibility.	Support	Senate - Health
AB 2405	Intensive behavioral health treatment facilities.	Support if Amended	Assembly - Health
AB 2410	Local educational agencies: home-to-school transportation.	Comments	Assembly - Education
AB 2511	Skilled nursing facilities: backup power source.	Support	Senate - Appropriations
AB 2535	Recreation and park districts: grants: playgrounds: disability access.	Support	Senate - Nat. Resources/Water
AB 2546	Resident-Designated Support Persons Act.	Support	Senate - Human Services
AB 2547	Housing Stabilization to Prevent and End Homelessness Among Older Adults and People	Support	Senate - Human Services
AB 2619	Residential care facilities for the elderly: capacity.	Tracked by ARCA	Assembly - Human Services
AB 2634	Developmental disabilities.	Tracked by ARCA	Assembly - Human Services
AB 2645	Local Emerg plans: integration of access & functional needs: community resilience ctrs	Support	Senate - Gov. Organization
AB 2680	Medi-Cal: Community Health Navigator Program.	Support	Senate - Health
AB 2693	COVID-19: exposure.	Tracked by ARCA	Senate - Appropriations
AB 2697	Medi-Cal: community health workers and promotores.	Support	Senate - Health
AB 2750	Department of Technology: digital equity plan.	Support	Senate - Gov. Organization
AB 2751	Affordable Internet and Net Equality Act of 2022.	Tracked by ARCA	Senate - Gov. Organization
AB 2776	Residential care facilities: placement of children.	Tracked by ARCA	Assembly - Pending Referral
AB 2786	Children's Crisis Continuum Pilot Program.	Support	Senate - Human Services
AB 2806	Childcare and developmental services: preschool: expulsion and suspension: mental health	Tracked by ARCA	Senate - Education
AB 2813	Long-Term Services and Supports Benefit Program.	Tracked by ARCA	Assembly-Aging/Long Term Care
AB 2823	Medi-Cal: beneficiary maintenance needs: home upkeep allowance and transitional needs	Support	Senate - Second Reading



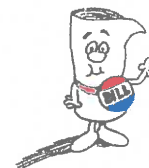
LEGISLATIVE REPORT
June 2022
 Respectfully Submitted by Jennifer Cummings
 Fair Hearings and Legal Affairs



Bill	Title	ARCA Position	Bill Location
AB 2827	Child daycare facilities.	Support	Senate - Human Services
AB 2841	Disqualification from voting.	Tracked by ARCA	Senate - Elections/Const Amend
AB 2853	Mental health: involuntary holds.	Tracked by ARCA	Assembly - Judiciary
AB 2917	State law: disability access. (construction-related accessibility claims)	Support	Senate - Appropriations
ACR 135	Suicide Prevention Week. (Sept. 4-10, 2022)	Support	Assembly - Rules
ACR 165	World Autism Awareness Day. (April 2, 2022)	Support	CHAPTERED
SB 17 (2-YEAR)	Office of Racial Equity.	Tracked by ARCA	Assembly - Appropriations
SB 21 (2-YEAR)	Specialized license plates: mental health awareness.	Support	Assembly - Transportation
SB 107 (2-YEAR)	CalFresh. Goal is to improve and simplify access to CalFresh	Support	Assembly - Public Safety
SB 128	Budget Act of 2022.	Tracked by ARCA	Assembly - Budget
SB 136 (2-YEAR)	Budget Act of 2022.	Tracked by ARCA	Assembly - Budget
SB 237 (2-YEAR)	Special education: dyslexia screening.	Support	Assembly - Education
SB 291 (2-YEAR)	Advisory Commission on Special Education: pupil advisory council.	Tracked by ARCA	Assembly - Education
SB 293 (2-YEAR)	Medi-Cal specialty mental health services.	Tracked by ARCA	Assembly - Appropriations
SB 387	Pupil health: school employee and pupil training: youth mental and behavioral health.	Support	Assembly - Education
SB 518 (2-YEAR)	Developmental services: Self-Determination Program.	Tracked by ARCA	Assembly - Human Services
SB 562 (2-YEAR)	Health care coverage: pervasive developmental disorders or autism. Revises "BHT" def.	Tracked by ARCA	Assembly - Inactive
SB 568 (2-YEAR)	Deductibles: chronic disease management.	Support	Assembly - Health
SB 692 (2-YEAR)	Local control and accountability plans: state priorities: least restrictive environment.	Tracked by ARCA	Assembly - Appropriations
SB 717 (2-YEAR)	Custom rehabilitation technology service providers: payment.	Support	Assembly-Comm. & Conveyance
SB 833	Community Energy Resilience Act of 2022.	Support	Senate - Energy, U & C
SB 840	Budget Act of 2022	Tracked by ARCA	Senate - Budget & Fiscal Review
SB 855	Childhood Drowning Data Collection Pilot Program.	Support	Senate - Health
SB 861	Dementia Care Navigator Grant Pilot Program.	Tracked by ARCA	Assembly-Aging/Long Term Care
SB 870	Developmental services. Modifies "developmental disability" age or origination from 18 to 22	Support if Amended	Assembly - Human Services
SB 882	Advisory Council on Improving Interactions between People with Intellectual and Development Disabilities and Law Enforcement.	Support	Assembly - Public Safety
SB 912	Biomarker testing.	Support	Assembly - Health
SB 966	Conservatorships: medical record: hearsay rule.	Tracked by ARCA	Assembly - Judiciary
SB 979	Health emergencies.	Tracked by ARCA	Assembly - Health
SB 988	Compassionate Access to Medical Cannabis Act or Ryan's Law.	Tracked by ARCA	Assembly - Health
SB 1005	Conservatorship: sale of personal residence.	Tracked by ARCA	Senate - Unfinished Business
SB 1019	Medi-Cal managed care plans: mental health benefits.	Support	Assembly - Health
SB 1033	Health care coverage.	Tracked by ARCA	Assembly - Health



LEGISLATIVE REPORT
June 2022
 Respectfully Submitted by Jennifer Cummings
 Fair Hearings and Legal Affairs



Bill	Title	ARCA Position	Bill Location
SB 1092	Developmental services: individual program plan: fair hearings.	Tracked by ARCA	Assembly - Human Services
SB 1093	Community care facilities: criminal background checks.	Support	Assembly - Human Services
SB 1113	Special education: inclusive education: universal design for learning.	Support	Assembly - Education
SB 1227	Involuntary commitment: intensive treatment.	Tracked by ARCA	Assembly - Health
SB 1238	Behavioral health services: existing and projected needs.	Support	Assembly - Health
SB 1279	Guardian ad litem appointment.	Tracked by ARCA	Assembly - Judiciary
SB 1354	Design-build contracting: cities, counties, and cities and counties: compliance with the	Support	Assembly - Appropriations
SB 1394	Conservatorships: gravely disabled persons.	Tracked by ARCA	Assembly - Health
SB 1416	Mental health services: gravely disabled persons.	Tracked by ARCA	Assembly - Health
SB 1421	California Interagency Council on Homelessness.	Support	Senate - Housing
SB 1446	Behavioral health-related treatment, housing that heals, and other services or supports.	Support in Concept	Assembly - Health
SB 1480	Remote accessible vote by mail systems.	Support	Assembly - Elections
SCR 71	Traumatic Brain Injury Awareness Month.	Support	Senate - Enrollment
SB 1092	Developmental services: individual program plan: fair hearings.	Tracked by ARCA	Senate - Judiciary
SCA 4 (2-YEAR)	Legislature: 2-year budget. Would put before the voters a two-year budget cycle for California.	Tracked by ARCA	Senate - Budget & Fiscal Review
SCR 91	Individuals with Developmental Disabilities Inclusion Month. (May 2022)	Sponsored by ARCA	Senate - Third Reading
SJR 4 (2-YEAR)	Special education funding. Would fully fund the federal IDEA.	Support	Assembly - Education
SJR 8	Social Security Disability Insurance: disabled adult child benefit.	Support	Assembly - Human Services

UPCOMING LEGISLATIVE DEADLINES & EVENTS:

Mid-May	May Revise and Hearings
May 23-27	Floor session only. No committees, other than conference or Rules Committees, may meet for any purpose
June 15, 30	Budget Bill must be passed by midnight
June 30	Budget Signature



MASTER TRUST of CALIFORNIA

Serving People with a Developmental Disability

BOARD OF TRUSTEES REPORT
July 11, 2022
RESPECTFULLY SUBMITTED BY LAURA MILLER

Cash Assets May 31, 2022	\$23,121,825.74
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COMMITTEE MEMBERS

Tom Cosand, Drew Cutler, Bob McGuire, Debra Mannon,
Evan Page, Jack Padilla, and Steve Spears

ANNOUNCEMENT

For the past five years, I have served as Master Trust Administrator and manager for the Revenue Department. Effective July 1, 2022, I will step down as manager for the Revenue Team. I will continue to serve the consumers of Inland Regional Center and across the state of California as Master Trust Administrator. The growth of both these departments has necessitated this change. I remain thankful for the learning opportunities afforded to me while managing these teams.

PUBLIC BENEFITS UPDATE

One of the many reasons a person seeks to open a special needs trust is to maintain eligibility for public benefits. Master Trust of California monitors changes to public benefits to ensure we are meeting the needs of our beneficiaries. Effective July 1, 2022, asset limits for non-MAGI Medi-Cal programs is increasing from \$2,000 to \$130,000. The resource limit for those same programs will be eliminated in January of 2024. Our committee has discussed how this may change administration and acceptance of new trusts to the program. Medi-Cal recipients who look to Master Trust for trust services, with assets under \$130,000, now have additional options. It's important to note that the resource limit for Supplemental Security Income, (SSI), has not changed and remains at \$2,000 for an individual.

ACCESS

In April and May of 2022, 129 requests were processed totaling \$193,347.56. Requests included association dues, attendant services, bus pass, cable bills, cell phone bills, cleaning services, clothing, concrete work, electronics, entertainment, federal and state taxes, gym membership, healthcare premiums, hygiene products, incontinence supplies, landscape services, legal fees, medical/dental expenses not covered by insurance, pest control, pool maintenance, rent, salon services, utilities, vehicle insurance, vehicle registration, and vehicle repairs.

P.O. Box 10338, San Bernardino, CA 92423 Telephone 909.382.4678 Facsimile 909.382.4687
Master Trust of California is a Program of Inland Counties Regional Center, Inc.
A California Non-Profit Corporation

Summary of VAC meetings for May and June 2022

April Stewart

Chair, Vendor Advisory Committee

The following is a summary of the May 16th and June 13th, 2022 VAC meeting. Announcements: VAC meetings will continue to be held monthly via zoom. Over 100 individuals participated in the zoom VAC meetings respectively. The new Regional Manager for SCDD, Patricia Herrera introduced herself to the group and gave an overview of her experience and an overview of the SCDD with main highlights on current SCDD initiatives during the March meeting. CJ Cook discussed caseload ratios in April

Summary by Vendor Category:

Vendor Group:	Concerns / Priorities
Day Programs:	Lynn De Anda (ideanda@desertarc.org). Day programs met with IRC in attendance. They discussed authorization challenges and ensuring IDT meetings are occurring for changes in services. They also discussed infection control plans due on 6/30.
Health Care Facilities	Michelle Clarke (mrarn@aol.com) Absent
Infant/Children's Programs:	Johanna Caicedo (Johana.caicedo@thementornetwork.com) They met with IRC rep in attendance. They discussed rate increases and the May revise and updates to early intervention. DDS is doing a targeted marketing campaign for early start with three RCs including IRC. Our VAC rep is involved in the planning.
Residential (4)	Kedra Creer – absent
Residential (2-3)	VACANT
Respite	Jenn Delgado (jdelgado@inlandrespite.com) The group met in June. They discussed updates on the vendor workforce updates, CPR training, and respite policy being updated to allow going outside the home. They also discussed EVV and timesheets.
SLS / ILS	VACANT
Specialist/ Support Programs	Doug McKown (dr.mckown@samaritancare.org) The group did not meet but continues to communicate via email as-needed.
Transportation	Felecia Arnold (nemt1stclasstransportation@yahoo.com) The group met and discussed the future of alternative services and end date expectations. They continue to work with day programs on issues including split shifts.
Vocational	Marie Chatman (mariechatman@weexceed.org) The group met and discussed rates and POS/billing challenges. Merissa Steuwer responded to concerns on POS/billing.
Behavior Mod:	Rachel Steward (rachel.steward@thementornetwork.com) No updates
Member-at-Large:	April Stewart (april@24hrcare.com), Audrey Andrade (audreymandrade@gmail.com) and Ruth Goodsell (rgoodsell@desertarc.org).

Membership Committee: Ruth Goodsell (rgoodsell@desertarc.org) – Ruth updated the group that there are still openings for ILS/SLS and Residential 2-3. She encouraged vendors to nominate reps that she can reach out to.

Regional Center Updates: Vince provided a report on updates from IRC and answered questions.

VAC meetings continue to be held monthly via Zoom

Ad Hoc Salary Review Committee Salary Schedule Corrections
Effective 7/1/2022

Position Code	Position	Hourly Step 1	Monthly Step 1	Annual Step 1	Hourly Top Step	Monthly Top step	Annual Top Step	Proposed Revisions 7/11/22
Exempt								
309	Diversity Outreach Coordinator (Cultural Specialist)	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
312	Consumer Program Liaison Specialist (CMS Specialist)	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
317	Fair Hearings Representative	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
319	Employment Specialist	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
331	Emergency Services Coordinator	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
342	Forensic Liaison/Specialist	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
346	Another Way Coordinator	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
353	Cultural Spec. Deaf & Hard of Hearing	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
354	System of Care Coordinator	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
355	Sr. CSC - SDP Participant Choice Specialist	\$ 31.0064	\$ 5,374.44	\$ 64,493.31	\$ 39.5729	\$ 6,859.30	\$ 82,311.63	Fixed math error in top step.
Non-Exempt								
511	Office Asst. to Exec. Asst.	\$ 18.8291	\$ 3,263.71	\$ 39,164.53	\$ 26.4944	\$ 4,592.36	\$ 55,108.35	Change Job Code from 550 to 511
601	Legal Affairs Technician - Fair Hearings	\$ 18.8291	\$ 3,263.71	\$ 39,164.53	\$ 26.4944	\$ 4,592.36	\$ 55,108.35	Add LAT position specific to Fair Hearings
549	CST 3 - Revenue	\$ 17.1735	\$ 2,976.74	\$ 35,720.88	\$ 23.0141	\$ 3,989.11	\$ 47,869.33	Add specific CST 3 for Revenue
550	CST 3 - Consumer Support Tech 3	\$ 17.1735	\$ 2,976.74	\$ 35,720.88	\$ 23.0141	\$ 3,989.11	\$ 47,869.33	Add back generic CST 3 position
559	HR Assistant	\$ 17.1735	\$ 2,976.74	\$ 35,720.88	\$ 23.0141	\$ 3,989.11	\$ 47,869.33	New name; formerly Employee Support Tech.
576	CST 1 - Fair Hearings and Legal Affairs	\$ 15.7500	\$ 2,730.00	\$ 32,760.00	\$ 21.1065	\$ 3,658.46	\$ 43,901.52	Add specific CST 1 position for Fair Hearings and Legal Affairs



INLAND REGIONAL CENTER

Enhancing Lives

...valuing independence, inclusion and empowerment

P. O. Box 19037, San Bernardino, CA 92423

Telephone: (909) 890-3000

Fax: (909) 890-3001

BOARD OF TRUSTEES APPLICATION			
Personal Information			
Last Name	First Name	Middle Initial	
Garnica	Carmela	F.	
DL or ID Number		Date of Birth	
Home Address			
City		State	Zip Code
County of Residence			
Mailing Address – if same as above check here <input type="checkbox"/>			
City		State	Zip Code
Occupation			
Program Director of Escuela De La Raza Unida Inc.			
Business Address			
City		State	Zip Code
Home Phone	Work Phone	Cell Phone	
E-Mail Address			

Information Required by the California Department of Developmental Services
[WIC § 4622]

Check all that apply:

(1) I am:

- ☒ a parent of a child with a developmental disability
☐ a client of a regional center
☐ a relative of a client at a regional center
☐ none of the above

(2) Which disability applies to the above?

- ☒ Intellectual disability
☐ Cerebral Palsy
☐ Epilepsy
☒ Austim/ASD
☐ Other _____

(3) Please check your ethnicity [WIC § 4622(d)]

- ☐ Asian
☐ African American
☒ Hispanic/Latino
☐ Native American
☐ White
☐ Other _____

Information Requested By the Nominations Committee of the Board of Trustees

Provide a brief summary of employment, education and relevant activities (or attach your resume):
I previously served on Inland Regional Board in the past for many years. Served on The State Council for Developmental Disabilities appointed by Gov Brown. Bachelor's in business from University Of Redlands, Masters in Education from Concordia University in Portland Oregon. Elected to serve PVUSD 90-95, elected to serve on Palo Verde Hospital District Board for 2 terms (present).

I am interested in serving on the Board of Trustees at Inland Regional Center because:
We need representation for Eastern Riverside County. I'm not referring to the lower desert of Coachella and Palm Springs. I am referring to the very remote lower, lower desert and Eastern along the Colorado River Eastern part of Riverside County.

What particular skills do you have that could assist the Board in its functions?
Critical thinker, good communicator, like to read and research. familiar with policies and procedures, regulations, working with parents. employees and the community.

Verification

By signing below, I am verifying that I am not currently employed as a provider of service to persons with developmental disabilities or a member of a governing board of any entity providing such service, which is funded in whole or in part with State Funds.

eSigned via SmartSign - cc.com
Carmela F. Garnica
Key: 45344a9271ba5b5151727d144ef8f1

Signature

03/30/2022

Date



INLAND REGIONAL CENTER

Enhancing Lives

...valuing independence, inclusion and empowerment

P. O. Box 19037, San Bernardino, CA 92423

Telephone: (909) 890-3000

Fax: (909) 890-3001

BOARD OF TRUSTEES APPLICATION			
Personal Information			
Last Name Leonard		First Name Theodore	
		Middle Initial Richard	
DL or ID Number		Date of Birth	
Home Address			
City		State	Zip Code
County of Residence			
Mailing Address – if same as above check here <input checked="" type="checkbox"/>			
City		State	Zip Code
Occupation N/a			
Business Address N/a			
City		State	Zip Code
Home Phone	Work Phone	Cell Phone	
E-Mail Address			

Information Required by the California Department of Developmental Services
[WIC § 4622]

Check all that apply:

(1) I am:

- ☐ a parent of a child with a developmental disability
☒ a client of a regional center
☐ a relative of a client at a regional center
☐ none of the above

(2) Which disability applies to the above?

- ☒ Intellectual disability
☐ Cerebral Palsy
☐ Epilepsy
☐ Austim/ASD
☐ Other _____

(3) Please check your ethnicity [WIC § 4622(d)]

- ☐ Asian
☒ African American
☐ Hispanic/Latino
☐ Native American
☐ White
☐ Other _____

Information Requested By the Nominations Committee of the Board of Trustees

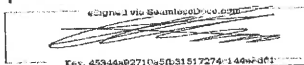
Provide a brief summary of employment, education and relevant activities (or attach your resume):
I worked for ability counts for 20 years I graduated from high school in 2001 I played in Special Olympics since I was 18 and I don't play anymore and now I am a stay at home dad helping my wife cook and clean and help with our 2 boys. I left ability counts in 2021 .

I am interested in serving on the Board of Trustees at Inland Regional Center because:
I like helping the consumers out I like helping the consumers that are afraid to speak for their selves I love standing and do public speaking

What particular skills do you have that could assist the Board in its functions?
I can do public speaking i am great with meeting new people I can interact with the consumers real good
And I care about what we do and I love that

Verification

By signing below, I am verifying that I am not currently employed as a provider of service to persons with developmental disabilities or a member of a governing board of any entity providing such service, which is funded in whole or in part with State Funds.


Key: 45344e02710a5b31517276-146e2-d01

Signature

05/10/2022

Date

1.2.4(a) PURCHASE OF SERVICE POLICY

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1.2.4(a) PURCHASE OF SERVICE POLICY

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1.2.4(a) PURCHASE OF SERVICE POLICY

Inland Regional Center will purchase those services and supports that assist individuals with developmental disabilities in achieving the greatest self-sufficiency possible and in exercising personal choices. The regional center shall secure services and supports that meet the needs of the consumer, as determined in the consumer's Individual Program Plan. Within the context of the Individual Program Plan, Inland Regional Center shall give highest preference to those services and supports which would allow minors with developmental disabilities to live with their families, adult persons with developmental disabilities to live as independently as possible in the community, and that allow all consumers to interact with persons without disabilities in positive, meaningful ways.

General Guidelines

Any person believed to have a developmental disability shall be eligible for initial intake and assessment services in the regional centers. Funds expended for the diagnosis and assessment of the developmental disability and may be limited to special diagnostic problems related to diagnosing the developmental disability.

Inland Regional Center shall identify and pursue all possible sources of funding for consumers receiving regional center services. These sources shall include, but not be limited to the following:

- 1) Governmental or other entities or programs required to provide or pay the cost of providing services, such as Medi-Cal, Medicare, the Civilian Health and Medical Program for Uniform Services, public education, and federal supplemental security income (SSI) and the state supplementary program (SSP);
- 2) Private entities, to the maximum extent they are liable for the cost of services, aid, insurance, or medical assistance to the consumer.

Regional Center funds shall not be used to supplant the budget of any agency which has a legal responsibility to serve all members of the general public and is receiving public funds for providing those services. In addition, Inland Regional Center will not purchase any service that would otherwise be available from Medi-Cal, Medicare, the Civilian Health and Medical Program for Uniform Services, In-Home Supportive Services, California Children's Services, private insurance, or a health care service plan when a consumer or a family meets the criteria of this coverage but chooses not to pursue that coverage. ((*WIC* §§ 4648 (a)(8) and 4659 (c).)

Additionally, services purchased by the regional center must be cost-effective and must meet the administrative requirements of the State and Inland Regional Center and must be approved for payment by Inland Regional Center in advance of the service being provided. (*WIC* § 4512 (b).)

1.2.4(a) PURCHASE OF SERVICE POLICY

Regional Centers are mandated to utilize the least costly provider who is able to accomplish the consumer's individual program plan, consistent with the particular needs of the consumer and the family. (*WIC* § 4648 (a)(6)(d).)

Families are counted on to carry out the same responsibilities for their family members with disabilities as they do for other family members. When the cost exceeds that of caring for a family member without disabilities, Inland Regional Center may provide funds for services to supplement that which parent/legal guardian/conservator(s) provide. Only when there are special needs related to a developmental disability, can financial assistance be provided by Inland Regional Center. (*WIC* § 4646.4 (a)(4).)

All requests for Purchase of Services will be documented in the consumer's Individual Program Plan/Individualized Family Service Plan and based on the consumer's needs. Purchase of Service will be reauthorized only when there is clear documentation that the consumer is making progress toward objectives that have been made. (*WIC* § 4648 (a)(7).)

Individual circumstances may exist which may require authorization of service purchases which are not consistent with these standards. Specific exceptions to these standards may be granted only on the following basis:

1. The Interdisciplinary Team (ID Team) must identify and document in the consumer's Individual Program Plan (IPP) or Individualized Family Service Plan (IFSP) circumstances warranting an exception to the standards.
2. The Compliance Review Team has determined that the requirements set forth in *WIC* § 4646.4 have been met.

CONSUMER SERVICES

Services for Children Ages 0-36 months

Regional Centers are the state's designee for service provision for children ages 0-36 months in California's Early Start Program for Infant and Toddlers. Regional Centers are required to develop an Individualized Family Service Plan and based upon the child's needs provide services mandated by Part C of the Individuals with Disabilities Education Act. Early intervention services include, but are not limited to:

- Assistive Technology
- Durable Medical Equipment
- Audiology
- For diagnostic or evaluation purposes only: Health Services, Nursing Services and Medical Services

1.2.4(a) PURCHASE OF SERVICE POLICY

- Nutrition Services
- Occupational Therapy
- Physical Therapy
- Speech Therapy
- Psychological Services
- Service Coordination
- Family Training, Counseling and Home Visits
- Special Instruction
- Behavior Therapy
- Interpreter/Translator (As Necessary)
- Transportation and related costs
- Vision Services
- Other services may, in special circumstances, be required when those services are necessary to enable the child to receive early intervention services.

Eligible children from 0-36 months are also entitled to the full range of relevant regional center services. Generic resources such as medical insurance must be pursued when available.

Inland Regional Center may provide funds for services to supplement those which parent/guardian/conservator(s) are counted on to provide when there are special needs related to the developmental disability for infants and toddlers who meet Early Start eligibility condition criteria and/or have an established risk of being developmentally delayed. Using the above guidelines, services may be purchased for eligible children from 0-36 months based on the needs and preferences of the consumer's family, taking into consideration a range of service options proposed by the Individual Family Service Plan Team, the effectiveness of each option in meeting the Individual Family Service Plan goals, and the cost effectiveness of each option.

Infant Education Programs

Inland Regional Center will utilize the generic services available from the school district for infant programs and will refer parents to those infant education programs offered by the schools. If the infant program provided by the school district does not meet the needs of the individual consumer, the Infant Services Coordinator may support the parents in addressing the issue through the Individual Family Service Plan.

Occupational/Physical Therapy

Occupational therapy may be purchased after the Interdisciplinary Team has developed an Individual Family Service Plan with the participation of regional center staff, and the parent/authorized representative. The efficiency of the program and continual need for the services is evaluated at least every four (4) but not more than six (6) months by the Interdisciplinary Team.

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Speech Therapy

Speech therapy may be purchased after the Interdisciplinary Team has developed Individual Family Service Plan with the participation of regional center staff, and the parent/authorized representative. The efficiency of the program and continual need for the services is evaluated at least every four (4) but not more than six (6) months by the Interdisciplinary Team.

Services Available to All Consumers

The Individual Program Plan team planning and decision process will identify supports and services for each consumer to achieve the greatest self-sufficiency possible based on the needs and preferences of the consumer, the consumer's representative or the consumer's family, taking into consideration a range of service options proposed by the Individual Family Service Plan / Individual Program Plan Team, the effectiveness of each option in meeting the Individual Family Service Plan / Individual Program Plan goals, and the cost effectiveness of each option.

These services may include, but not be limited to:

Behavior Modification Services

Behavior modification services are intended to provide interventions that result in changes that will assist the consumer to adapt or alter the occurrence or performance of his or her behavior.

Behavior modification services may be provided for children and adults on a case by case basis as determined by the Interdisciplinary Team process.

Applied Behavioral Analysis (ABA) services may be authorized for those consumers with intensive behavioral intervention needs, and parent/guardian/conservator(s) are required to participate in the training. Funding of these services by Inland Regional Center will not exceed 40 hours per week across all settings (school and home) and will be re-evaluated every six (6) months.

Insurance Co-Payment Reimbursements

Insurance deductible or co-payment reimbursements are required for services such as Applied Behavioral Analysis, Speech Therapy, Occupational Therapy and Physical Therapy. When a service has a deductible or co-payment, the payment will be reimbursed with the following process:

The vendor will request the deductible or co-payment from the family at the time of service. The family will pay the deductible or co-payment to the vendor. The family will send the Explanation of Benefit (EOB), via an email to the Inland Regional Center Behavior Specialist Technician. In

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the body of the email, they will provide the name and Unique Client Identifier (UCI). IRC will reimburse the vendor once invoiced and according to the patient's responsibility indicated on the EOB. The vendor will then in turn reimburse the family.

Conferences

Within available resources, Inland Regional Center may fund conference registration fees for consumers and/or their parent/guardian/conservator(s) to attend conference(s) related to the consumer's developmental disability(ies) at a maximum of \$600 per family, per fiscal year. All requests must be made and authorized in advance and be supported by an Individual Program Plan objective for conferences.

Day Program for Adults

After graduating or receiving a certificate of completion from public or private education, consumers will be supported in determining the program services of their choice. Preference is given to those program services which constitute the least restrictive option, emphasize community integration and critical skills development, in addition, preference is given to the closest, most appropriate and cost-effective program that meets the consumer's needs. Funding through the Department of Rehabilitation, enrollment in Adult Education and Regional Occupational Programs may be utilized to maximize consumer integration in the community.

Diapers/Incontinence Supplies

Diapers for a consumer who is three years of age or older may be approved when the family can demonstrate financial need and when doing so will enable the child to remain in the family home. The incontinence supplies purchased must be the same type of incontinence supplies available to consumers through Medi-Cal. Private and generic sources first must be exhausted.

Medical and Diagnostic Requests

The regional center may purchase incidental medical or dental services after private and generic sources have been exhausted and will consider using the most cost-effective services first. All requests must be accompanied by a copy of the denial from Medi-Cal or the consumer's health/medical private insurance.

Inland Regional Center is unable to purchase the following medical and diagnostic services:

- Experimental treatments
- Therapeutic services or devices that have not been clinically determined or scientifically proven to be effective, or safe, or for which risks, and complications are unknown
- Medical or diagnostic evaluations not related to the developmental disability
- Psychological evaluations that are not used to determine eligibility

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Mobility Training

Mobility training will be purchased only for travel between the adult consumer's home and primary day activity (day program, trade school or work). The Interdisciplinary Team will determine if the consumer's residence and primary day program are within a reasonable walking distance of a bus line.

There must be consensus between the Consumer Services Coordinator, consumer, and parent/guardian/conservator(s) that once mobility training has been successfully completed, the public bus system will be used to access the consumer's primary day activity.

Occupational/Physical Therapy

Occupational/Physical therapy is a program intended to assist consumers who evidence a significant delay in gross and fine motor and self-help skills and who could benefit from the service. Purchase of occupational therapy is offered to consumers who have a demonstrated need, and who do not qualify for such services through generic resources such as Medi-Cal, California Children's Services (CCS), privately funded resources or family health/medical insurance.

Out-of-Home Placement

Inland Regional Center will explore all available resources prior to considering the first time placement of minors. Parental financial support may be required through the Parental Fee Program process.

Adult consumers who desire to move away from the family home will be assisted in selecting the setting that will best match their needs. These may include licensed homes by either the Department of Social Services Community Care or Department of Public Health. Consumers wishing to reside independently in their own home or apartment may benefit from Supported Living Services.

Respite Services

Respite care is defined as temporary and intermittent care provided for short periods of time (1) in the consumer's own home or (2) out-of-home respite may also occur at an approved residential facility or setting to support family members in keeping consumers in the home. It is intended to relieve family members of the demanding responsibility of caring for the consumer by providing care and supervision to ensure consumer's safety in the absence of family members. When the family has authorization for ongoing in-home respite and wants a one-time out-of-home respite authorization, the hours of in-home respite may be modified accordingly.

1.2.4(a) PURCHASE OF SERVICE POLICY

While it is recognized that WIC § 4690.2 requires in-home respite to be provided in the “client’s own home,” exceptions may be made on an individual basis pursuant to the Individual Program Plan. Exceptions must ensure that the original intent of the respite is maintained.

Respite services authorized for minor consumers are subject to California’s Family Cost Participation Program (FCPP). Families have 30 days from the date they are notified of the cost participation amount to ask for a review of the rate. As allowed by CCR § 56265, the Regional Center’s Executive Director or designee may adjust the level of cost participation.

Respite hours may be authorized for an individual with medical care needs pending generic funding e.g., Early Periodic Screening, Diagnosis and Training (EPSDT) or Home and Community-Based Alternative (HCBA) Waiver Program. The regional center will only consider services such as In-Home Supportive Services as a generic resource when the approved services meet the respite need as identified in the consumer’s individual program plan or individualized family service plan.

Children between 0-21 years of age may receive EPSDT funding support. Adults ages 21 years plus may receive HCBA Waiver funding support.

A regional center may only purchase respite services when the care and supervision needs of a consumer exceed that of an individual of the same age without developmental disabilities.

Exceptions made to all purchases of service must be identified by the Interdisciplinary Team and documented in the client’s Individual Program Plan. If there is any disagreement about services that cannot be resolved by the planning team, written notice of fair hearing rights will be provided. (WIC §§ 4646(i) and 4710.5(a)).

Special Equipment: Durable and Non-Durable Miscellaneous Items and Home Modifications

Special equipment may be purchased by Inland Regional Center after the Interdisciplinary Team has identified the need during the Individual Program Plan meeting with the participation of the consumer, parent/guardian/conservator(s), regional center, other program staff and care provider, if appropriate. The equipment purchased must encourage independence, inclusion and empowerment. If the consumer is a child, a referral must be made to CCS for assessment/evaluation of need and potential funding before Inland Regional Center may purchase such equipment. These assessments should include options that are most appropriate to meet the needs of the consumer and family.

Other resources for special equipment may include the Department of Rehabilitation, Medi Cal, private insurance, and other community resources depending on the age of the consumer.

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Speech Therapy, Evaluation and Therapy for Assistive Technology Evaluation

Speech therapy is a program intended to assist consumers who evidence a significant delay in receptive/expressive language skills and who could benefit from the service. Purchase of speech therapy is offered to consumers who have a demonstrated need, and who do not qualify for such services through generic resources such as Medi-Cal, privately funded resources or family health/medical insurance.

Speech Evaluation and Therapy for Assistive Technology Evaluation is provided by the respective school districts. Other sources such as the schools, private insurance and other generic agencies will be researched. IRC may provide an assistive Technology Evaluation to determine appropriate equipment for in-home use as determined by the Interdisciplinary Team.

Independent Living Services

Independent living skills services provide adult consumers with functional skills training to enable the individual to acquire or maintain skills to live independently in his or her own home, or to achieve greater independence while living in the home of a parent, family member, or other person. Independent living programs focus on functional skills training for adult consumers who generally have acquired basic self-help skills and who, because of their physical disabilities, do not possess basic self-help skills, but who employ and supervise aides to assist them in meeting their personal needs. Independent living skills services may also provide the supports necessary for a consumer to maintain a self-sustaining, independent living situation in the community.

Independent living skills functional skills training components may include:

- a. Cooking;
- b. Cleaning;
- c. Shopping in natural environments;
- d. Menu planning;
- e. Meal preparation;
- f. Money management, including check cashing and purchasing activities;
- g. Use of public transportation in natural environments;
- h. Personal health and hygiene;
- i. Self-advocacy training;
- j. Independent recreation and participation in natural environments;
- k. Use of medical and dental services, as well as other community resources;
- l. Community resource awareness such as police, fire, or emergency help; and
- m. Home and community safety.

The regional center may purchase independent living skills training if the following criteria are met:

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1. The adult understands the goals and expectations of the service,
2. The adult expresses a willingness to participate, and
3. The IPP team agrees the training will help the individual to meet the goals set forth in the IPP.

Independent living skills services shall specify a course of intervention for skill acquisition. The type of training services and the number of hours per month, is determined by the needs and choices of the individual, based upon existing skills and targeted goals to increase independence. Independent living skills should not be used to replace or supplant any other generic resource legally responsible to provide services to the general public. (*WIC* § 4648 (a)(8).) Practical considerations should also be given to the individual's typical routines and day-to-day activities.

Supported Living Services

The intent of supported living services is to provide opportunities for adults with developmental disabilities, regardless of the degree of disability, to live in homes that they own or lease with support available as often and for as long as it is needed, when that is the preferred objective in the individual program plan. The purpose is to assist that individual to exercise choice in his or her life while building critical and durable relationships with other individuals. Adult consumers are supported in typical living arrangements with control over the environment within their own home. The services or supports that a consumer receives shall change as his or her needs change.

Supports and services purchased by the regional center would generally be expected to decrease over time as the individual gains independent living skills and self-reliance, natural supports are developed, and generic resources are accessed, to the fullest extent possible, with the assistance of service providers.

Supported Living Services consist of two components:

- a. Training and Habilitation - Individual Service Plan goals must be tailored to the specific training and habilitation needs and capacities of an individual consumer, and is intended to result in an increased ability on the part of the consumer to establish and maintain relationships, assume and exercise membership in the community, and meet his/her needs without assistance.
- b. Personal Support – Individual Service Plan goals address areas where assistance is needed with common daily living and routine household activities due to the nature or severity of the consumer's physical or developmental challenges. When the consumer is unable to demonstrate reasonable success in their training and habilitation goals and no

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generic resources are available to meet consumer needs, supports may be addressed in the Individual Service Plan as maintenance goals through Personal Support.

Initial services may be established to assist consumers in securing their own homes and to provide consumers with the supports needed to live in their own homes.

In keeping with the Lanterman Act, the purchase of this service shall be based upon demonstrated progress toward meeting the goals and objectives in the Individual Program Plan and Individual Service Plan.

Transportation

In considering the purchase of transportation services for consumers, Inland Regional Center will explore all transportation services from the least restrictive to the most restrictive method of transportation.

In addition, Inland Regional Center may purchase transportation services that will facilitate the services identified in the consumer's Individual Program Plan only when generic resources are unable to provide the transportation on a routine basis for the consumer or are not assigned by regulation to other entities (i.e. residential operator's responsibility to transport residents to medical and recreational opportunities).

Inland Regional Center will only fund transportation, when required from the consumer's residence to the lowest-cost vendor that provides the service that meets the consumer's needs. The cost of a vendor shall be determined by combining the vendor's program costs and the costs to transport a consumer from the consumer's residence to the vendor. (*WIC* § 4648.35.)

When a choice is available between public and private transportation service or voucher, public transportation will be purchased as it is more cost effective and allows consumers to interact with the general public.

A regional center may fund transportation services for a minor child living in the family residence to meet needs identified in the Individual Program Plan, only if the family of the child provides sufficient written documentation to the regional center to demonstrate that it is unable to provide transportation for the child. Inland Regional Center will not purchase transportation services to enable school-aged children to receive educational services.

Camp and Associated Travel Expenses

The regional center may purchase camp activities and associated travel expenses to support the Individual Program Plan (IPP). An IPP can be requested by contacting your Service Coordinator. Camp may be provided in an outdoor or natural setting, with an emphasis on social skill building. If a portion of the camp is provided in an indoor setting, the setting must be

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integrated (example: community recreation center, YMCA, etc.). Camp is allowable as a form of out of home respite.

Camp will be classified as either residential (client stays the night) or day camp (client goes home every day). Regional Center will purchase camp as identified in the IPP.

Travel expenses associated with a family member getting the client to and from the camp site will be allowable through a Financial Management Service.

Nonmedical Therapies

The regional center may purchase specialized recreational therapies and training for clients and their families to support the Individual Program Plan (IPP). An IPP can be requested by contacting your Service Coordinator. Programs must be designed to increase and improve a client's interpersonal and social skill level. A vendor must be credentialed or licensed as required to practice in the field of therapy offered, if applicable. Vendors should provide the service in an integrated community setting, as much as possible. Examples of nonmedical therapies can include but are not limited to art, dance, music, equestrian and other programs and therapies that allow for interpersonal and social skill building.

Social Recreation

Socialization Training Program is intended to provide socialization and recreational opportunities to consumers served by Inland Regional Center with appropriate structured socialization and recreational activities based on the consumers' needs, interests and goals identified in the IPP.

Socialization programs will provide in-the-moment coaching and facilitation to promote inclusion and skill development. Activities should enhance and develop meaningful interpersonal relationships and integration opportunities by accessing public recreation and leisure facilities. Socialization Training will not supplant services available from the local school district.

For individuals who have reached their established social recreation goals, a maintenance service can be provided. The service is intended to reinforce the social skills previously achieved.

A monthly stipend can be requested to assist the families in purchasing integrated social activities. The monthly stipend is based on the average monthly cost of local activities and is not intended to supplant the consumer's natural supports but allows for all consumers to have the ability to have robust social opportunities.

Exceptions made to all purchases of service must be identified by the Interdisciplinary Team and documented in the client's Individual Program Plan. If there is any disagreement about services

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that cannot be resolved by the planning team, written notice of fair hearing rights will be provided. (*WIC* §§ 4646(i) and 4710.5(a)).

Educational Services

Educational Services for children three to 17 may be funded when the need has been identified in the IPP and the following conditions have been met:

1. The service is not available through the educational system and/or school district.
2. All generic resources have been exhausted.
3. The service is not a typical parent responsibility for minor children.
4. The consumer's need for extraordinary care, services, supports and supervision, and the need for timely access to this care has been considered.

Educational Advocacy may be accessed once the Consumer Services Coordinator (CSC) has attempted to resolve any grievances and/or disputes with the consumers School District via the IEP process. The purpose of this service is to provide the consumer with the enhanced advocacy with mediation and appeals.

Exceptions

Individual circumstances may exist which may require authorization of service purchases by Inland Regional Center which are not consistent with these standards. Specific exceptions to these standards may be granted:

1. The Interdisciplinary Team identifies and documents in the consumer's Individual Program Plan or Individual Family Service Plan circumstances warranting an exception to the standards.
2. Any applicant for or recipient of services, or authorized representative of the applicant or recipient, who is dissatisfied with any decision or action of the service agency which he or she believes to be illegal, discriminatory, or not in the recipient's or applicant's best interests, shall, upon filing a request within 30 days after notification of the decision or action complained of, be afforded an opportunity for a fair hearing. (*WIC* § 4710.5 (a).)
3. Each consumer or any representative acting on behalf of any consumer or consumers, who believes that any right to which a consumer is entitled has been abused, punitively withheld, or improperly or unreasonably denied by a regional center, developmental center, or service provider, may pursue a complaint pursuant to *WIC* § 4731.

Disputes concerning the nature, scope, or amount of services and supports that should be included in an Individual Program Plan should be addressed through the Fair Hearing process as described in item #2 of this section. (*WIC* §§ 4700-4730).

1.2.4(a) PURCHASE OF SERVICE POLICY

Policy adopted by Inland Counties Regional Center, Inc. Board of Trustees on February 13, 2012, pending approval from the Department of Developmental Services (DDS).

Approved by DDS on May 23, 2012.

Board Approved on November 13, 2017

Board Approved on March 12, 2018 pending approval from DDS

Board Approved on May 14, 2018

Board Approved on November 4, 2019

MASTER TRUST OF CALIFORNIA INVESTMENT OBJECTIVES AND POLICIES

I. INTRODUCTION

Master Trust of California (MTC) is a pooled special needs trust program operated by Inland Counties Regional Center, Inc. a California Non-Profit Corporation, and is committed to serving the needs of individuals with special needs and their families. All of the trusts administered by MTC are Special Needs Trusts, which allow the disabled beneficiary to hold assets in trust to provide for their current and future supplemental needs while retaining eligibility for public benefits such as SSI and Medi-Cal.

II. PORTFOLIO COMPOSITION AND ASSET ALLOCATION

Objectives

The primary investment objective is to preserve capital balanced with conservative growth.

Investments will be focused on quality securities that are diversified among asset classes and within a broad range of government and industry categories for each asset class to help minimize risk. Low cost, high quality, institutional style investment solutions will be used where available and present.

Risk and return are considered inseparable. There exists a correlation between portfolio returns and the amount of portfolio risk one is willing to accept. Portfolio's emphasizing solely long-term growth tend to experience high price fluctuations over the short-term. Growth comes with a price of higher volatility and larger valuation swings.

Diversification

Diversification is a risk management strategy that combines a wide variety of investments within a portfolio. It attempts to limit exposure to any singular investment or asset class. Diversification is an all-weather portfolio advantage.

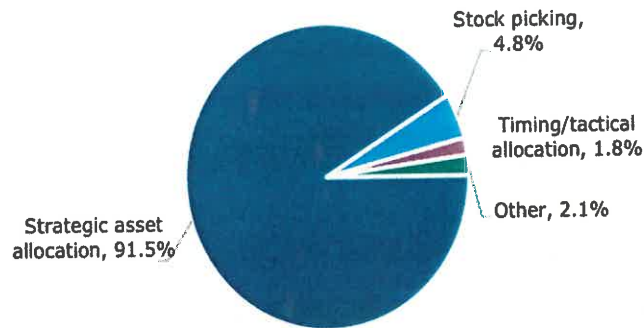
By combining assets through diversification, the MTC seeks to minimize volatility yet optimize returns for a given level of risk. The rationale behind this technique is that a portfolio constructed of different asset classes will, in theory, yield higher long-term returns with lower volatility compared to the risk of any individual holding or security.

Diversification is an admission that we cannot predict the future. Since the future is unknowable, diversification, the combining of different assets with different return characteristics and risk profiles, is a core Master Trust principle.

Strategic Asset Allocation

Asset allocation is an investment theory that aims to determine portfolio return attribution. In other words, "What makes a portfolio go up, and what makes it go down".

Widely accepted research by Brinson, Beebower and Singer determined that a portfolio's asset allocation decision was responsible for the majority of its variation of return. According to their research, individual security selection and market timing contributed less than 7% of a portfolio's return.



MTC will focus on the asset allocation decision and minimize individual security selection and short-term market timing.

Asset Classes		
U.S. Equities	International Equities	Government Debt
Corporate Debt	Commodity	Real Estate
Precious Metals	Certificate of Deposits	Foreign Exchange

Investment vehicles that compliment a strategic asset allocation strategy are:

- low-cost institutional style mutual funds
- exchange traded funds (ETFs) from experienced, reputable providers

Many large pensions, trust and foundations rely on these investment vehicles as primary tools in implementing their strategic asset allocation strategy.

Re-Balance

Over time, the return of asset classes can be quite uneven. If left unattended, a portfolio's risk characteristics can be altered by market returns. Periodic re-balancing allows investment portfolios to keep its risk levels in check and prevent imbalances. The Master Trust portfolio will be re-balanced, as necessary, but at least once a year.

Cost Efficiency

Investment management, transaction, custodial, research and consulting fees are all money management realities. Acknowledging and monitoring these costs are part of a successful investment process.

Minimizing or eliminating costs like frequent transactions, commissions, high expense mutual funds, front-end load mutual funds and contingent deferred sales charges contributes to enhanced portfolio returns.

Time Horizon

The MTC portfolio is invested with a time horizon outlook of between 7 to 10 years.

Risk Profile

The risk profile for the MTC portfolio is to preserve capital balanced with conservative growth.

Restricted Direct Investment Securities

The MTC portfolio shall not include any of the following types of investments:

- Annuities
- Cryptocurrency
- Non-Fungible Tokens (NFTs)
- Leveraged Exchange Traded Funds
- Stand alone Futures
- Stand alone Options
- Stand alone REIT's
- Special Purpose Acquisition Companies (SPAC)
- Private Equity
- Individual Bonds

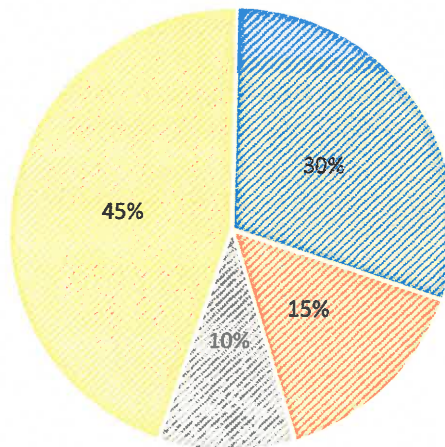
Target Portfolio

Investment objective and risk profile are two primary asset allocation determinants. Also important are general market investment conditions: interest rates, economic growth expectations, inflation outlook, valuation levels, political stability.

With the understanding that Policy Targets are long-term in nature and will change given general investment market conditions, a target portfolio example would be:

PORTFOLIO ALLOCATION

■ U.S. Equity ■ Int'l Equity ■ Alternative ■ Fixed Income



Target Allocation	Asset Class	Range
30%	U.S. Equity	10 – 60%
15%	International Equity	0 – 30%
10%	Alternative	0 – 20%
45%	Fixed Income / Cash	20 – 80%

Actual portfolio allocations will vary within the above ranges given the Investment Committee's outlook for optimal returns given prevailing market conditions.

U.S. Equity: U.S. Domestic Stocks

International Equity: Foreign Stocks

Alternative: Commodity, Real Estate, Precious Metals

Fixed Income/Cash: Bills, Notes and Bonds (Govt, Corporate, Domestic and Foreign)

Benchmarks*		
Asset Class	Benchmark	General Description
U.S. Equity	S&P 500	U.S. Domestic Stocks
International Equity	MSCI EAFE	Foreign Stocks
Alternative: Commodity	MSCI World Na Resources	Natural Resources
Alternative: Precious Metals	LBMA Gold Price	Gold
Fixed Income Govt Bond	US Bloomberg Long Treasury	US Bloomberg Long Treasury
Fixed Income Corporate Bond	Bloomberg US 5-10 Yr Corp	Corporate Bonds
Cash	1-3 Month US Treasury Index	ST Money Market

*Note: particular funds may be benchmarked to a more specific benchmark than listed above.

Taxation

Designated as a California Special Needs Trust (SNT), the MTC is subject to taxation.

The tax impact of purchasing and selling securities and their interest and dividends will be taken into consideration as one of the many factors in developing the portfolio.

Duty and Conflicts of Interest

All members of the Master Trust Committee, the Investment Committee and any investment advisor or consultant have a duty of loyalty to the MTC (the Client) and must:

- Act with reasonable care, exercise prudent judgment and must act for the benefit of the Client and place the Client's interests before those of themselves or their employer.
- Determine that an investment is appropriate for, and consistent with, the Client's written objectives, mandates, and constraints before making an investment recommendation or taking investment action.
- Have a reasonable and adequate basis, supported by appropriate research and investigation, for any investment analysis, recommendation or action.
- Promptly make full and fair disclosure of all matters that could reasonably be expected to impair their independence and objectivity or interfere with their duty to the Client.
- Must promptly disclose to the Client any compensation, consideration or benefit that has been or will be received from, or paid to, others for the recommendation of, or investment in, any particular investment product or service.
- Must promptly disclose to the Client any ownership of, or financial interest in, any investment product or service that is recommended to the Client.

III. MONITORING OF OBJECTIVES AND RESULTS

- A. All objectives and policies are in effect until modified by the Investment Committee, which will review them as needed for their continued appropriateness. The Investment Committee will meet as needed to review the performance of the portfolio.

- B. If at any time any investment manager or consultant believes that any policy guideline inhibits his or her investment performance, it is his or her responsibility to communicate this view to the Investment Committee.
- C. The trust portfolio will be monitored on a periodic basis for consistency of investment philosophy, return relative to objectives, and investment risk. Risk will be evaluated as a function of asset concentration, exposure to extreme economic conditions, and performance volatility. The trust portfolio will be reviewed by the Investment Committee as needed, but results will be evaluated over rolling five-year periods. However, the Investment Committee will regularly review the investment advisors or consultants to confirm that the factors underlying the performance expectations remain in place.
- D. Investment advisors or consultants will report the following information to the Investment Committee at least annually: total return (on time-weighted basis, before fees and after fees) in the aggregate, and disaggregated for the equity and fixed income portions, net of all commissions, and purchases and sales for the quarter. Regular communication concerning investment strategy and outlook is expected. Additionally, the investment advisors or consultants are required to promptly inform the Investment Committee of any change in firm ownership or fundamental investment philosophy, any significant change in organizational structure or professional personnel, any change in portfolio manager(s) for the MTC's account or any change in the investment advisors' or consultants' registration status with any regulatory agencies such as the S.E.C.
- E. At all times the investment and management of the assets in the Master Trust portfolio shall comply with the California Uniform Prudent Investor Act (*Probate Code* §§ 16045 *et seq.*).

IV. PERIODIC INVESTMENT REVIEWS

- A. Trust performance will be measured by the asset allocation and appropriate established benchmarks. Reviews must be periodic and not less than annually. Should performance in any particular asset class lag, changes would be considered.
- B. The investment advisor or consultant is required to report to the Investment Committee any areas of underperformance. Watchlists will be created for underperforming funds and/or securities. Underperforming funds and/or securities can be monitored and removed or replaced, if warranted.
- C. The Investment Committee will periodically review the related services provided to the trust, including custodial services and consulting.