CFP Task Force MEETING MINUTES – September 30, 2021

<u>Attendees</u>

<u>Discussion of Draft Learning Objectives</u>

Dialogue with clients and families, in a culturally competent way, regarding caregiver succession planning using appropriate language.

- Helen Neri – How will this be operationalized?
- Betsy H. Moore – Need to have an understanding in the loss of day to day activities and functions such as driving a car and how they'll make up for that lost function.

Describe a range of living options, including independent living, supported living, family home agencies, and residential care, to clients and their families.

- Create a person-centered IPP Narrative that captures the wishes of client planning team in relation to future living options.
- Karen Mulvany – Instead of expecting individuals and families to come up with a plan; advocate to encourage people to come up with a prioritized list of preferred outcomes; life, law, and resources all change.

Articulate the benefit to clients and families of early planning for caregiver succession – setting a foundation for the regional center to formalize the discussion of future planning.

- Lisa Cooley – Advocates that as a recipient of IHSS services there should be a plan for caregiver succession, and she believes the function is not in place yet.
- David Lopez – Encourages SC's to talk to families earlier than later; he likes the idea of having that information ahead of time to know the available options.
- Sergio – suggested that even talking to younger clients is beneficial, its important for this information
- Calvin – Talking to clients at younger ages normalizes the conversation and destigmatizes the topic. It will also remove the concept of it being a "scare tactic". Every IPP should include a review plan in the event of a catastrophic event. Be Proactive!
- David – wanted to follow up and reassure that we are not looking at "placing" clients somewhere and just having a general conversation.
- Lavonne – Talking to the clients needs to be at the right time, you need to have a good repor with the client and their family.
- Karen wanted to follow up with Lavonne's statement; That although having the conversation is necessary, understand that the SC's should not feel like they've failed if they can not lock down a successor, maybe there are just several different people who are unfit to be the conservator and that is good knowledge to have.
- Calvin – Cultural Competency – The clients will obviously have different reactions depending on your rapport, these conversations should be client-focused, and it should not be a conversation of an SC going down a list of options and/or that the plan that the SC has in mind as being the ONLY option.
- Sergio – We need to be sure that the conversation does not feel like a "checking the box" type of conversation.
- Sara Spencer – Ideas for Training: Roleplay, work out some of these challenging situations to work out the difficult situations, work out the stages of grief, working through the denial phase with families. t would be good for service coordinators to know of the tools and resources to equip families with, the SC's need to be equipped with prepared phrases. If someone puts up a

wall, provide a list of ideas to bring them back into the conversation. This is a sensitive topic and it will have an impact with how SC's communicate with the families. They're not Psychiatrists but they're there and it's a less threatening and its helpful in the planning process. Talk with families about crisis planned decision making and early planning decision making. Talk about why it would be important to have these ideas.

- Lisa – We are just educating the clients and families on their options, Be sure we are not advertising different services, we are sharing information with them and them with us.
- Herman – Grief/Bereavement – recognizing end of life – Captured non-finite grieving – given the transition and stage in life revisits the experience that the families go through. All those feelings and emotions are revisited we are talking about different life choices, going to college/marriage but it doesn't mean our clients have these opportunities or don't, but end of life planning for individuals. The parents may not be worried what happens in their passing. There will be different ways to address housing and security.
- Marcus & John – I also talked with an individual who asked if the tool included an orientation face to face explaining the process more in depth then paper work? She stated that would work better for her to understand the future of her planning regarding her children. Certainly, look at the implementation stage that the trainings need to be recorded. Would be done via Webex – grab all the SC's really easily. Easily record the information.
- Describe a range of living options, including independent living, supported living, family home agencies, and residential care, to clients and their families.
- Create a person-centered IPP narrative that captures the wishes of the client and planning team in relation to future living options.

Share future planning tools that can assist clients and families related to accessing affordable housing, power-of-attorney, special needs trust, CalABLE, conservatorship, and end of life care decisions.

- Betsy – it was challenging at first, it was a cumbersome system, however that is not the case now, and it's been improved and the benefit is that it is easily changeable. I can't see how I could do this without having something altogether and its safe and easy to use.
- Karen – At some point that SC's will need to make it clear to the families that housing is not funded by the Regional center. Not everyone knows that, there's an educational component. Families that can provide housing to loved ones, we need to encourage them to use tools, to include special needs transfer and what is appropriate and DO NOT leave it to chance. It may be a separate component. We need to relieve the pressure on the affordable housing that is already in short supply.
- Tania Desha – Opens up the opportunity to start talking about things, As many tools you can provide to SC's will make it easier, heck even things on the website. Some people do not want to talk about this information with SC's there are personal beliefs and what the SC's represent. Give SC's an opportunity to offer services on the website, in the event they are uncomfortable and don't want to talk about it. If the clients and families put up walls don't need to pressure families into creating a plan but they do need to think about the future. Sometimes a plan is created and then the plan can fall apart, so tools then would need to be provided. Support independent living or living with siblings is a viable option.
- John – SC's roles during this scope of information – Lets all be okay with the learning objectives will not be discussing everything, but 4 general topic areas, there should be enough substantive information in 4 groups. What everyone's responsibilities will be and what to expect.
- Sara – as we move forward with the subtopic areas – there is some planning for introduction. Set realistic expectations for SC's they may leave without a plan and that the families may be

resistant to these ideas. And what to write in the IPP's what happened. A rolling plan, or something to be addressed in the future. What a succession plan will look like.

Discussion of next steps/future meetings

- Your involvement will be crucial – early next week is sending out a poll to everyone that you will indicate your first and second choices for the areas that you'll be interested in. Training materials will be need to be created in the span of 3 months. If we have some good draft learning objectives here, we can share with the committees. Finalizing the feedback from the different groups. People will be able to provide feedback to the direction we are trying to lead this training to go.
- Breaking off into subgroups – November meeting – Probably skip December meeting, may find early January meeting, the facilitators will have 2 additional meetings a month, for the facilitator to initially figure out subtopics to cover on each of these sections, and what will the roles look like. John's role is to work on auditing meetings. Mechelle will also join the meetings. They will be there to help clear the air on some topics. Continuity, ultimately sign off on the final content that gets pushed through for the SC's to be trained.
- Norma and Tania will not be part of the groups – they will be quality assurance specialists, they will pop up in meetings, and when we have a monthly meeting, john will facilitate it, we will get updates on sub groups from SC's. Tanya and Norma have talked to facilitators enough to provide an update to the entire group of the progress of the subgroups for the meetings. If Norma and Tanya have a difficult time discussing what the training materials are YOU may need to redesign your training materials. These 4 different groups/meetings will be a great way to check up on what we're working on. Collaborating with the other subgroups, potentially starting this in early spring next year. Developing a newsletter, it will go out on January 1st. Highlight learning objectives and this work group. Group identify a client/client family member willing to participate in delivering the training. Benefit of drawing from stake holders, it comes out so much better when you're really hearing it from someone who is actually affected by it.

Q&A Section

1. Robert - When will we be splitting into groups? October or November? If we can finalize the learning objectives in October then we can start talking about subtopics as a group.
2. Karen – When you send out the invitation to folks to join the various subgroups- list your expectations for the deliverables, that the volunteers, that the staff will be responsible to create and clarify materials. Yes, there is an expectation that the 3-month period has a lapse, at least we will have slides that have been developed. We will have the ability to have a presentation that will be modified by many members. Developing a cloud based google slides-based presentation, so that you can jump into the slides and update them in real time. John is going to work on that. Additionally, John informs the group about Asana. October – introduce Asana as the project manager side. Incorporate this into the projects.

4 groups

3 Associate Client Services Director and Training Managers will be leads.
Mixture of clients and families, advocates – look at training materials, thinking about it.

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WEBEX Chat Consolidation Corner:

from Robert Levy to everyone: 10:07 AM
I just wated to bring up that one person with a disability just lost one of a parent being hteir mom the client is from PEC where I provide services that is one exsmples why we need to be part of this task force at Alta regional center. here in the Sacremento area.
from Robert Levy to everyone: 10:08 AM
sorry about that thier.
from Robert Levy to everyone: 10:08 AM
soeey about that again their.
from Patti Uplinger to everyone: 10:16 AM
would remaining in family home or with ADU in #3?
from Lisa cooley to everyone: 10:24 AM
Describe options for IHSS and caregiver succession
from Steven to everyone: 10:27 AM
Good point Betsy.
from Robert Levy to everyone: 10:34 AM
My parnets have been planning about what would happen for myself when they do pass away.
from Robert Levy to everyone: 10:34 AM
being my future life without my parents.
from Karen Mulvany to everyone: 10:37 AM
Articulating the benefit of "Early planning" should be "early, flexible planning", and should emphasize that the client's right to choice will be supported — by allowing the client to identify a prioritized list of preferred living options and what is NOT preferred. The SC must recognize that in almost all scenarios, the client will not have had an opportunity to actually try out multiple living options, and client's preferences may change over time. Also, not all options may be immediately available at the time the parent is no longer able to serve. There may need to be a temporary solution implemented while the permanent living option is set up. If it is not already in place, it can take 1-2 years to set up SLS, for example.
from Karen Mulvany to everyone: 10:39 AM
Sorry, sent my input twice by accident!
from Steven to everyone: 10:41 AM
There is also ILS.
from Steven to everyone: 10:43 AM
I wanted to move out because I thought what if something happened to my parents.
from Lori Banales to everyone: 10:47 AM
I am so happy that these conversations are happening and training in all of these areas are being developed. Critically important if we are going to be able to support clients in their preferred living arrangement.
from Lori Banales to everyone: 10:48 AM
I have to join another meeting now, but will continue to join in to hear the great work that you are doing on behalf of clients and families. TY for your time and interest in this initiative!
from Zach Horch to everyone: 10:52 AM
Thank you Lori!
from Lisa cooley to everyone: 10:53 AM
Explain to families that we are not advertising for different services. We are sharing information with them.
from Karen Mulvany to everyone: 10:57 AM

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To put my comments in writing, in the training, service coordinators need to fully understand that they should not feel that they have failed if don't identify a successor caregiver when the family states that there is no suitable successor caregiver in their family. Not all families will contain a suitable successor caregiver and that input must be recorded. Identifying unsuitable options is very important information that must be part of coordinated future planning.
from marcushuff to everyone: 11:08 AM
I also talked with an individual who asked if the tool included an orientation face to face explaining the process more in depth then paper work? She stated that would work better for her to understand the future of her planning regarding her children.
from Karen Mulvany to everyone: 11:12 AM
Addressing housing insecurity will mean that any housing that can be provided by the family should be detailed, along with funding for maintenance, repairs, taxes, insurance, etc.
from Karen Mulvany to everyone: 11:20 AM
The last item seems to me to be more about future planning tools, not future care planning tools. Housing is a core component that should be addressed in planning but it isn't really a care resource.
from Lisa cooley to everyone: 11:25 AM
Talk to Dante Allen about cal able to get accurate information regarding cal able.
from Alta California Regional Center to everyone: 11:29 AM
DRC is providing a training on CalABLE on October 20th, you are all invited to attend
from Alta California Regional Center to everyone: 11:48 AM
Hello Everyone, I need to prepare for a 12 Noon meeting. I look forward to connecting next time.
~Jennifer Bloom, ACRC
from Zach Horch to everyone: 11:49 AM
thank you for listening in Jen!
from Daphne Chakurian to everyone: 11:55 AM
Onward! Good seeing everyone!