

Strategic Plan 2024-2027



RCeB
Regional Center of the East Bay

Welcome

To Our RCEB Community,

The RCEB Board of Directors and staff are pleased to share with you the 2024-2027 RCEB Strategic Plan that will serve as a roadmap to continuous improvement over the next three years. We are especially proud that this plan was developed through a collaborative process. The collective insights from people we support and their families, service providers, regional center staff, and board members have helped to create this plan. Your input, gathered through a Community Survey and participation in various meetings throughout the year, was essential in shaping the direction we are now taking, and your ongoing engagement will be vital as we bring this vision to life.

The 2024-2027 RCEB Strategic Plan includes five Strategic Focus Areas:

Continuous Process Improvement – to simplify and improve the experience of interacting with regional center processes

Work Culture – to enhance the internal work culture and employee experience and attract and retain high quality staff who reflect the diversity of our community.

Diversity, Equity, Inclusion, and Belonging (DEIB) – to ensure that people supported by the regional center their families feel respected and have equitable access to information about regional center processes and services.

Communication and Engagement – to improve response times and communication about programs and services, particularly in times of change

Person-Centered Services Planning – to continue to improve the regional center’s capacity to provide planning processes that are personalized

As we begin this new chapter, we look forward to celebrating the progress we make and the successes we achieve together.

Thank you for your dedication, passion, and commitment to our mission. Let’s continue to work together to create lasting positive change.

Warm regards,



Lisa Kleinbub
Executive Director



Frank Paré
Board President





OUR MISSION, VISION, AND VALUES

The Beliefs that Align us:

In support of people with intellectual and developmental disabilities, we believe...

- all people deserve equitable access to lives of their choosing.
- when the world is unfair to people with intellectual and developmental disabilities, we have a role and responsibility to help equalize the playing field.
- people with intellectual and developmental disabilities make valuable contributions to our society.
- people with intellectual and developmental disabilities should be treated with respect and dignity.
- together with community stakeholders, we can find innovative solutions.

The Mission that Guides us:

Driven by the belief that everyone deserves to lead a life of their choosing, RCEB partners with individuals with intellectual and developmental disabilities, their families, and the community, to create opportunities for independence and fulfillment.

The Vision that Inspires us:

We envision a future where individuals with intellectual and developmental disabilities live and work, doing what they love, without limitations!

Core Values:



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Strategic Focus Areas

Operational Focus Areas

Continuous Process Improvement

Work Culture

Diversity, Equity, Inclusion, Belonging (DEIB)

Communication and Engagement

Person-Centered Services Planning

Performance Contract Measures

Fiscal Compliance

Strategic Focus Area 1 – Continuous Process Improvement

What is meant by “Continuous Process Improvement”?:

Regional centers are complex organizations that can be difficult to navigate. RCEB aims to simplify and streamline its systems and processes to improve the experience of people receiving services, families, and service providers. We believe improvements in this area will contribute to increased efficiency, employee morale, and overall satisfaction with regional center services.

Why is Continuous Process Improvement a strategic priority?:

Feedback from the RCEB community suggests that the intake process for people over the age of three, parent reimbursement processes, and service provider processes of Authorizations (POS) and Vendorization, can take a long time and are perceived as being inconsistent.

What we want to achieve:

RCEB will review and seek opportunities to streamline, simplify, and take steps to improve the experience of interacting with the following processes and systems.
 1.1 Increase satisfaction related to the

reimbursement of clients/families who pay for authorized social recreation.

1.2 Meet or exceed statewide requirements for timelines for people referred to regional center over the age of 3 for eligibility determination (120 days).

1.3 Complete the initial IPP within 60 days of eligibility determination and transfer to case management.

1.4 Reduce retroactive services and improve timeliness of payment to service providers.

1.5 Update case management and financial systems (SANDIS/CERMS, UFS) according to the Department of Developmental Services (DDS) implementation plan.

How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
1.1 Community Satisfaction Survey Q# related to timeliness and ease of process for reimbursed services. (TBD)	N/A	Develop question(s) for survey, begin to implement improvement strategies.	Administer survey, establish baseline, continue to implement improvement strategies.	Review survey results and modify strategies as needed.
1.2 Percent of instances 120-day timeline is met to complete the intake process for referrals of people over the age of three. *PC	77.78% (2022)	Meet or exceed statewide average	Meet or exceed statewide average	Meet or exceed statewide average
1.3 Percent people over the age of three (3), who have their initial IPP meeting within 60 days of having been transferred to case management for Lanterman Services.	TBD	(# and % of Total) Increase 10% over baseline	(# and % of Total) Increase 10% over prior year	(# and % of Total) Increase 10% over prior year

PC*= Performance Contract Measure



Strategic Focus Area 1 – Continuous Process Improvement continued

How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
1.4 Number of POS authorizations reported as missing by service providers/vendors.	FY2324 Annual monthly average = 71 per month	FY2425 Reduce annual monthly average by 10% over baseline	FY2526 Reduce annual monthly average by 10% over prior year	FY2627 Reduce annual monthly average by 10% over prior year
1.5 San Diego Information System (SANDIS)/CalWIN Electronic Records Management System (CERMS), Uniform Fiscal System (UFS) is updated according to DDS implementation Plan.	On Track	On Track	On Track	On Track



Strategic Actions – Continuous Process Improvement

Goal One

Increase satisfaction related to the reimbursement of clients/families who pay for authorized social recreation.

Year	Actions	Resources
Year 1	a. Create and implement policy and procedure for reimbursements <ul style="list-style-type: none"> Establish policy stating what is eligible for reimbursement for Board approval by December 2024. Write internal procedure to simplify authorization process. b. Engage one or more FMS providers to process reimbursements for social recreation. c. Train case managers on how to process social recreation reimbursement claims and support families through the process. d. Add Satisfaction Survey question related to timeliness and ease of process for reimbursement.	<ul style="list-style-type: none"> Case Management Accounting Community Services
Year 2	e. Develop and implement Communication strategy to inform parents, families, and individuals with disabilities, of the new reimbursement procedures.	
Year 3	f. Monitor satisfaction survey data and implement continuous improvement strategies based on results.	



Strategic Actions – Continuous Process Improvement continued

Goal Two

Meet or exceed state requirement for timelines for over 3 eligibility determination (120 days).

Year	Actions	Resources
Year 1	a. Distribute information developed by DDS to explain the intake and assessment process for referrals over the age of three (3). b. Review internal procedures for tracking and communicating individual, record updates to reduce inefficiencies in workflow. <ul style="list-style-type: none"> • Map the current process • Identify barriers and opportunities for innovation and improvement c. Develop and implement Intake Engine to increase efficiencies in the intake process. d. Develop and include a satisfaction survey question regarding the intake process for people over the age of three (3).	<ul style="list-style-type: none"> • Case Management • Intake and Assessment • Case Management • Support Staff
Year 2	e. Update and implement with staff a shared checklist /flowchart of the information needed for families, the community, and staff. f. Develop a video, translated in threshold languages, to explain the intake and assessment process for people over the age of three (3) and steps to initiate services. g. Test Intake Engine process for scheduling assessments and tracking information, meetings, forms completion, etc.	
Year 3	h. Clarify and modify processes as new UFS/CERMS comes into use. i. Pilot Intake Engine processes with Intake over three (3) years of age. <ul style="list-style-type: none"> • Modify process based on pilot results. 	



Strategic Actions – Continuous Process Improvement continued

Goal Three

Reduce the time needed between Lanterman eligibility and initial IPP once a person is made eligible or re-activated. (Separate from 1.2)

Year	Actions	Resources
Year 1	a. Together, with input from stakeholders, map the process to identify gaps and opportunities for improvement. b. Implement Reorganization Plan in an effort to reduce caseloads.	<ul style="list-style-type: none"> • Case Management • Support Services
Year 2	c. Recommend and implement pilot strategies, based on mapping the process, that might include, but not be limited to: <ul style="list-style-type: none"> • Create internal procedures and timelines. • Establish a process for continuing those transitioning from Early Start. • Identify a dedicated role for transition. • Inform Early Start case managers about the IPP process and children’s services. 	
Year 3	d. Train case managers on revised procedures. Implement at scale. Evaluate and modify as needed.	



Strategic Actions – Continuous Process Improvement continued

Goal Four

Reduce retroactive services and improve timeliness of payment to service providers.

Year	Actions	Resources
Year 1	a. Define missing POS' and establish baseline numbers for missing POS by service type.	<ul style="list-style-type: none"> Case Management
Year 2	b. Review and update POS Authorization Process to reduce retroactive services.	

Goal Five

Update case management and financial systems (SANDIS/CERMS, UFS) according to the DDS implementation plan.

Year	Actions	Resources
Year 1	a. Participate in statewide CERMS/UFSM project.	<ul style="list-style-type: none"> Case Management Accounting Information Systems
Year 2	b. Clean data in SANDIS/UFS by December 2025 according to Department guidelines.	
Year 3	c. Implement new system by December 2026, pending Department guidance.	



Strategic Focus Area 2 – Work Culture

What is meant by “Work Culture”?:

The regional center seeks to attract and retain high quality staff who reflect the diversity of the community. This strategic priority will focus on enhancements to the internal work culture and employee experience to become an employer of choice. This includes initiatives to enhance communication, professional growth and development, recognition, and total compensation strategies.

Why is Work Culture a strategic priority?:

Families want knowledgeable case managers who are empathetic and helpful.

Employees want engagement, support, resources, skills and knowledge to continue developing professionally and to do their best work.

Community members acknowledge that the work of case managers is hard and recognize a need for additional training and lower caseloads.

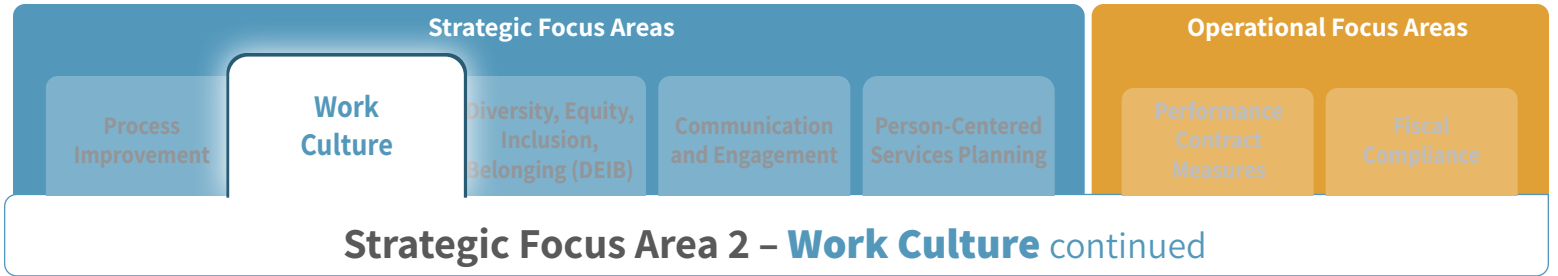
What we want to achieve:

- 2.1 RCEB has a satisfied, well-informed workforce that would recommend RCEB as a great place to work.
- 2.2 RCEB has an intentional focus to foster a welcoming and equitable workplace.
- 2.3 RCEB develops and implements a growth and professional development strategy to support agency learning and development needs and cultivate the next generation of regional center leadership.

How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
2.1 Percent of employees who are “promoters” based on Employee Survey Results.	TBD	Develop and administer engagement survey. Establish baseline projected to be at or above 60%.	Implement strategies based on survey data. Improvement over baseline.	Administer engagement survey. Improvement over prior year.
2.2 RCEB staff is comparable to, within 10% of, the ethnic demographics of Alameda and Contra Costa counties.	NA	Develop methodology for monitoring. Report on baseline.	Implement strategies based on data. Comparable within 10% to county demographics.	Comparable within 10% to county demographics.
2.2 Plan to embed DEI principles throughout the organization.	NA	Create a DEI strategy for RCEB.	Implement strategies according to DEI plan.	Modify and expand strategies as needed.

PC*= Performance Contract Measure



Strategic Focus Area 2 – Work Culture continued

How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
2.3 Percent Internal promotions.	TBD	Develop methodology for monitoring. 25% Internal promotions.	Implement strategies based on survey data. 25% Internal promotions.	Reports should reflect efforts towards goal. 25% Internal promotions.
2.3 Retention rate of new hires.	90% FY2324	Develop methodology for monitoring. At or above baseline	Implement strategies based on survey data. At or above baseline	Reports should reflect efforts towards goal At or above baseline

PC*= Performance Contract Measure





Strategic Actions – Work Culture

Goal One

RCEB has a satisfied, well-informed workforce that would recommend RCEB as a great place to work.

Year	Actions	Resources
Year 1	a. Update RCEB core values. <ul style="list-style-type: none"> Engage consultant to develop and administer employee values survey. Analyze data and share with workgroup to draft values definitions. Finalize values definitions with senior management team and RCEB Board of Directors. b. Develop and administer an employee survey to understand the landscape of employee engagement at RCEB. c. RCEB articulates and communicates a total compensation philosophy that includes tangible and intangible benefits of employment.	<ul style="list-style-type: none"> Human Resources Senior Management Team
Year 2	d. Incorporate agency compensation philosophy into the narrative for recruitment and hiring. e. Develop and implement employee recognition plan. f. Develop role-based performance standards that demonstrate values in action. g. Establish baseline for employee engagement. Identify and implement improvement goals.	
Year 3	h. Integrate values into organizational processes, including recruitment, selection, onboarding, and performance management. <ul style="list-style-type: none"> Support department leads in integrating values into respective processes. i. Re-administer employee engagement survey every other year. Monitor results and identify improvement goals. <ul style="list-style-type: none"> Evaluate implementation and modify based on feedback. 	



Strategic Actions – Work Culture continued

Goal Two
 RCEB has an intentional focus to foster a welcoming and equitable workplace.

Year	Actions	Resources
Year 1	<p>a. Develop outreach plan for recruitment.</p> <ul style="list-style-type: none"> • Analyze DEI data to inform and modify recruitment strategies. • HR continues to participate in college job fairs in the community. • Conduct outreach to Community Based Organizations to post job opportunities and access new communication/media outlets that are language based. 	<ul style="list-style-type: none"> • Human Resources • LACC • Senior Management Team
Year 2	<p>a. Update standards for using effective communication channels (i.e. email, intranet, etc.)Develop role-based performance standards that demonstrate values in action.</p> <p>b. Employees have the information they need, when they need it, and how they need it.</p> <p>c. Develop organizational standards for giving and receiving feedback.</p> <p>d. Increase awareness and understanding of DEI principles and concepts through regular, ongoing training.</p> <p>e. Celebrate diversity within RCEB through staff-led diversity celebrations and events that showcase different cultures and backgrounds through the year.</p> <p>f. Departments develop aspiring performance expectations that are shared, discussed, and implemented throughout their department.</p>	



Strategic Actions – Work Culture continued

Goal Three

RCEB develops and implements a growth and professional development strategy to support agency growth, ongoing learning and development needs and the cultivation of the next generation of regional center leadership.

Year	Actions	Resources
Year 1	a. Hire a training manager to assist in the development of growth and professional development training unit plan. b. Develop and implement customer service training.	<ul style="list-style-type: none"> Human Resources
Year 2	c. Establish learning and development unit within Human Resources. d. Implement growth and professional development plan. e. Develop and implement supervisor training to include skills need to develop employees and manage teams.	
Year 3	f. Implement career pathways that clarify skills and competencies for employee growth and development. <ul style="list-style-type: none"> Year 1 – Case Management Year 2 – Admin / Tech Year 3 – Management 	

Strategic Focus Areas

Process Improvement

Work Culture

Diversity, Equity, Inclusion, Belonging (DEIB)

Communication and Engagement

Person-Centered Services Planning

Operational Focus Areas

Performance Contract Measures

Fiscal Compliance



Strategic Focus Area 3 – Diversity, Equity, Inclusion, Belonging (DEIB)

What is meant by “DEIB”?:

Organizations prioritizing DEIB are more likely to positively impact their communities. RCEB continues to work towards ensuring that people supported by the regional center and their families feel respected and have equitable access to information about regional center processes and services, in understandable, preferred languages.

Why is DEIB a strategic priority?:

Purchase of Services (POS) data and feedback from the community show that inequities exist. More people are asking for case managers that speak their language.

What we want to achieve:

3.1 RCEB will expand culturally and linguistically responsive programs and services. development through language access and resource development.
 3.2 People served by RCEB have equitable access to information about all services including in their preferred language and modality.

3.3 Service providers have access to training to increase their awareness and ability to provide services in ways that are congruent with the cultural preferences of the people they support.
 3.4 Staff are trained in the areas of cultural humility, implicit bias, and how to support our diverse population.

How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
3.1 Number of providers who identify that they can serve languages other than English and are engaging with diverse communities.	TBD	Administer a service provider language survey and establish baseline.	Improvement over baseline. Identify strategies for continued improvement.	Improvement over prior year.
3.2 Equity and Cultural Competency Number of individuals supported by the RCEB and families who report their case manager communicates with them in their preferred spoken language culture.	TBD	Establish satisfaction survey question and baseline.	Improvement over baseline. Identify strategies for continued improvement.	Improvement over prior year.
3.2 The percentage of families supported by the regional center (includes no POS) who agree or strongly agree their case manager respects their family’s culture.	TBD	Establish satisfaction survey question and baseline.	Improvement over baseline. Identify strategies for continued improvement.	Improvement over prior year.

PC*= Performance Contract Measure



Strategic Focus Area 3 – Diversity, Equity, Inclusion, Belonging (DEIB) continued

How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
3.3 Provide training twice each year to service providers to increase awareness of and ability to provide culturally and linguistically responsive quality services.	N/A	At least two (2) training are offered with pre and post survey.	At least two (2) training are offered with pre and post survey.	At least two (2) training are offered with pre and post survey.
3.4 Annual refresher training is offered to all staff in the areas of cultural humility, implicit bias, and how to support our diverse population.	N/A	Annual refresher training offered with pre and post survey.	Annual refresher training offered with pre and post survey.	Annual refresher training offered with pre and post survey.

PC*= Performance Contract Measure



Strategic Focus Areas

Process Improvement

Work Culture

Diversity, Equity, Inclusion, Belonging (DEIB)

Communication and Engagement

Person-Centered Services Planning

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Strategic Actions – Diversity, Equity, Inclusion, Belonging (DEIB)

Goal One

Increase the number of providers who identify that they can serve languages other than English and are engaging with diverse communities.

Year	Actions	Resources
Year 1	a. Administer annual survey to providers of the four most used service codes to understand language accessibility and where gaps exist.	<ul style="list-style-type: none"> Community Services
Year 2	b. Review POS data of current service codes and expenditures by location to assess what services are available in each county and identify existing gaps. c. Establish a process, using the IPP survey, to identify the emerging and unmet language needs of transition-age youth. Use the data to develop services for young adults as they transition to adult services. d. Develop a Request for Proposal (RFP) process to develop resources in response to identified needs. <ul style="list-style-type: none"> Explore feasibility of establishing incentives to develop programs in underserved communities. Implementation will be pending available resources. 	





Strategic Actions – Diversity, Equity, Inclusion, Belonging (DEIB) continued

Goal Two

People served by RCEB have equitable access to information about all services and policies in their preferred language and modality.

Year	Actions	Resources
Year 1	a. Utilizing the Individual Program Plan (IPP) signature page, develop a question for how people prefer to be communicated with by RCEB. b. Develop a process during intake to determine and document a person’s/family’s preferred mode of communication. c. Identify communities where outreach efforts have not been conducted in recent years and develop a plan to participate in or develop events.	<ul style="list-style-type: none"> • Case Management • Intake and Assessment
Year 2	d. Update a welcome handbook for people when they become eligible for services. Use the handbook to explain, in more detail, the role of the regional center, the Individual Program Plan (IPP) process, and the ongoing relationship with your RCEB team. Translate to multiple languages and in multiple modalities (printed, digital). e. Create informational videos in various languages. f. Explore community partnerships with Community-Based Organization (CBO) to expand relationships in underserved communities.	
Year 3	g. Expand use of language line contract for translation by all departments. Make this service available through posters, and laptops/tablets for front desk staff.	



Strategic Actions – Diversity, Equity, Inclusion, Belonging (DEIB) continued

Goal Three

Service providers have access to training to increase their awareness and ability to provide services in ways that are congruent with the cultural preferences of the people they support.

Year	Actions	Resources
Year 1	a. Complete survey for service providers to identify what training needs they have and assess overall needs.	<ul style="list-style-type: none"> • Equity and Compliance • Community Services • Person-Centered Thinking trainers
Year 2	b. Develop and implement a training plan that responds to needs identified in survey. <ul style="list-style-type: none"> • Leverage the CTEC – PCT Training and Culture (Community Training and Education Committee) to gather input and communicate information. • Provide training twice each year to service providers to increase awareness of and ability to provide culturally and linguistically responsive quality services. 	
	c. Provide Person-Centered Thinking training, open to provider community, at least twice each year.	

Goal Four

Staff receive training in the areas of cultural humility, implicit bias, and how to support our diverse population.

Year	Actions	Resources
Year 1	a. Develop a plan for ongoing regional staff training in cultural humility and implicit bias. b. Establish a required baseline of trainings for all staff. Provide annual refresher training to all staff in areas of cultural humility, implicit bias, and how to support our diverse population. c. Develop survey questions for families and people served regarding how satisfied they were with staff respect for their language and culture.	<ul style="list-style-type: none"> • Equity and Compliance • Human Resources
Year 2	d. Update staff training plan and programs to incorporate the perspective of families and people served by the regional center.	

Strategic Focus Areas

Process Improvement

Work Culture

Diversity, Equity, Inclusion, Belonging (DEIB)

Communication and Engagement

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Strategic Focus Area 4 – Communication and Engagement

What is meant by “Communication and Engagement”?:

People with developmental disabilities and their families want strong relationships with case managers, responsiveness, and transparency about available services and supports.

Why is Communication and Engagement a strategic priority?:

Satisfaction with the regional center is dependent on helpful relationships and strong partnerships between case managers and individuals and families served by the regional center.

Survey respondents want more timely response times and more communication, particularly in times of change. People with disabilities and their families want more connection with case managers, in ways that work for them (some want home visits while others want to continue to connect remotely). People want more information about available services and supports.

What we want to achieve:

- 4.1 RCEB serves people and families who are well informed about services and report being satisfied with the regional center including their case manager.
- 4.2 Quicker response to calls and emails. Calls and emails answered in a timely fashion.
- 4.3 Individuals and families served by the regional center are informed of their ability to choose their preferred location (in-person or remote).



How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
4.1 Satisfaction Survey question related to case management.	N/A	Develop satisfaction survey question(s) to measure. Begin to implement improvement strategies.	Administer survey. Establish baseline. Begin to implement improvement strategies.	Modify improvement strategies based on survey results.
4.2 Satisfaction survey question on case management responding in a timely manner.	N/A	Develop satisfaction survey question(s) to measure. Begin to implement improvement strategies.	Administer survey. Establish baseline. Begin to implement improvement strategies.	Modify improvement strategies based on survey results.
4.3 Satisfaction survey question related to choice of meeting locations.	N/A	Develop satisfaction survey question(s) to measure. Begin to implement improvement strategies.	Administer survey. Establish baseline. Begin to implement improvement strategies.	Modify improvement strategies based on survey results.

PC*= Performance Contract Measure



Strategic Actions – Communication and Engagement

Goal One
 Increase satisfaction with case management.

Year	Actions	Resources
Year 1	a. Engage consultant to develop community satisfaction survey. b. Clarify expectations of case management performance, including timeliness of response c. Establish protocol of how to use RCEB Getting Started Brochures and agency website. d. Complete age series brochures. e. Create an internal and external outreach and communication plan on how to use the brochures.	<ul style="list-style-type: none"> • Human Resources • LACC • Senior Management Team • Case Management • Communications • Intake Coordinator • DEAI Manager • Website • Training Unit/ Coordinator • Training Committee
Year 2	f. Train staff on how to use RCEB Getting Started Brochures and website to explain information, working with families in a person-centered way – discovery beyond the paperwork. g. Administer community satisfaction survey, establish baseline, conduct team level review meetings to identify drivers of satisfaction. h. Develop and implement an orientation to regional center services for individuals and families who are new to RCEB. i. Arrange more training for staff from community partners to raise awareness of community resources and services. j. Develop a protocol to inform individuals and families when there is a case manager on a leave of absence or vacancy. k. Develop a coordinated process to support individuals and families during times of transition to a new case manager. <ul style="list-style-type: none"> • Clarify expectations for communication across teams/depts throughout this process. • Update and implement transfer checklist • Update communication piece that is shared with families to explain the process and who to contact with questions. • Develop a mechanism for families to know who to contact while in transition. • Reinforce information to Case Managers about assessment counselors’ availability for consultation. 	
Year 3	l. Designate an outreach, communications, and access role within the agency.	



Strategic Actions – Communication and Engagement continued

Goal Two
 Inquiries from individuals and families are responded to in a timely manner.

Year	Actions	Resources
Year 1	a. Clarify expectations for communications through email signatures and voicemail messages.	<ul style="list-style-type: none"> • Senior Management Team • Office Management Team • Department Managers • Information Systems
Year 2	b. Maximize use of newsletter and website to communicate RCEB values, services and standards of performance.	
Year 3	c. Develop an internal resource to better connect people contacting the regional center with the requested information. d. Research the development of a searchable database for customer service frequently asked questions.	

Goal Three
 Individuals and families served by the regional center are informed of their ability to choose their preferred location for meeting (in-person or remote).

Year	Actions	Resources
Year 1	a. Update the case management assignment letter to include reminder that meetings can be requested in-person or via Zoom. b. Develop a pre-meeting checklist to identify preferred meeting place and other meeting preparation steps.	<ul style="list-style-type: none"> • Case Management • Support Services • Office Management • Training
Year 2	c. Prioritize a warm and welcoming environment as office furnishings are updated to be more friendly and inviting for families. Research the development of a searchable database for customer service frequently asked questions. d. Provide training for regional center staff on building rapport and customer service, including information about requirements and choice of meeting location.	

Strategic Focus Areas

Process Improvement

Work Culture

Diversity, Equity, Inclusion, Belonging (DEIB)

Communication and Engagement

Person-Centered Services Planning

Operational Focus Areas

Performance Contract Measures

Fiscal Compliance

Strategic Focus Area 5 – Person-Centered Services Planning

What is meant by “Person-Centered Services Planning”?:

People with disabilities and their families are grateful for the services provided by the regional center while recognizing the opportunity for continuous improvement and greater personalization. Community members seek regional center services that are personalized and identified through a person-centered planning process.

Why is Person-Centered Services Planning a strategic priority?:

People with disabilities and their families are advocating for more personalized services and supports. Person-centered planning and person-centered approaches are a statewide priority to enhance the experience of people with disabilities and to align with home and community-based services standards. People want regional center services that are based on what is important to an individual and not based on a formula.

What we want to achieve:

- 5.1 People with disabilities and their families have access to information about available regional center funded services.
- 5.2 Individuals and families experience open communication and connection with their case managers.
- 5.3 Individual Program Plans (IPP) are reviewed regularly in a person-centered process that accommodates the individual’s life changes.
- 5.4 All regional center staff are trained in person-centered thinking. Case management staff will receive training in person-centered planning.



How will we know we are making progress?

Metric	BASELINE	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
5.1 Number of policy and process documents available in threshold languages.	N/A	TBD	TBD	TBD
5.2 Percentage of people who agree their case manager was skilled in developing a person-centered planning process. (DDS)	N/A	Develop satisfaction survey question(s).	Administer survey. Establish baseline.	Increase over baseline.
5.3 Percent of IPPs after Jan. 1, 2025 that use the new statewide format.	N/A	100% of IPPs due in this time period.	100% of IPPs due in this time period.	100% of IPPs due in this time period.
5.4 Number and percent of people trained in Person-Centered Thinking or Person-Centered Plan Facilitation.	TBD	% of new staff FY2425 complete PCT training by June 2025.	TBD	TBD

PC*= Performance Contract Measure



Strategic Actions – Person-Centered Services Planning

Goal One

People with disabilities and their families have access to information about available regional center funded services.

Year	Actions	Resources
Year 1	a. Processes that impact individuals and families directly are prioritized for translation into threshold languages. b. RCEB Service Options for Individuals with Intellectual and Developmental Disabilities is reviewed annually, updated as needed, and made available in threshold languages on the RCEB website. c. Enhance case managers’ assessment and interview skills, and their ability to explain services to individuals and families. d. Enhance RCEB website to be more user friendly. e. Post service descriptions on website.	<ul style="list-style-type: none"> • Human Resources • LACC

Goal Two

Individuals and families experience open communication and connection with their case managers.

Year	Actions	Resources
Year 1	a. Training for case managers on facilitation of IPP meetings and how to gather information in a collaborative, person-centered way and write it into an IPP. b. RCEB Service Options for Individuals with Intellectual and Developmental Disabilities is reviewed annually, updated as needed, and made available in threshold languages on the RCEB website.	<ul style="list-style-type: none"> • Human Resources • LACC
Year 2	b. Develop resources and provide information for individuals and families about the IPP process, and how to partner with the case manager to develop a person-centered services plan. c. Provide training and resources for individuals and families about how to prepare for an Individual Program Plan (IPP) meeting.	

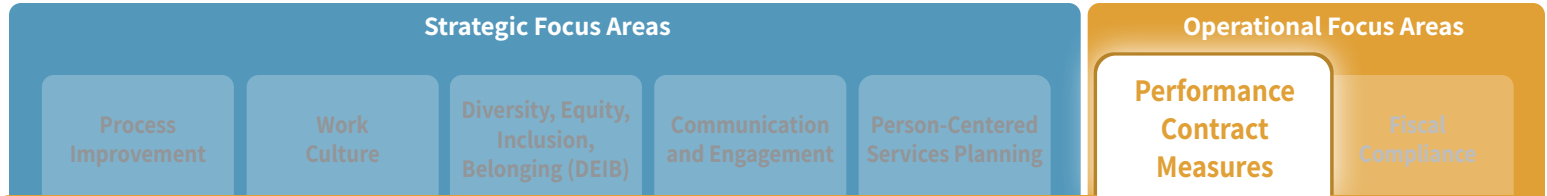


Strategic Actions – Person-Centered Services Planning continued

Goal Three

Case managers are trained in person-centered planning.

Year	Actions	Resources
Year 1	a. Define what person-centered planning is for clients, families, and service providers. b. Develop an abbreviated overview of person-centered thinking and planning for clients and families. <ul style="list-style-type: none"> • Create and begin peer to peer training • Create and begin family training c. Develop and implement plan an infrastructure to build and sustain capacity for person centered thinking and planning. <ul style="list-style-type: none"> • Complete Person-Centered Thinking trainer certification (2 additional trainers by August 30, 2024, 1 additional by December 30, 2024) • Identify and convene a Person-Centered Thinking Steering Committee 	<ul style="list-style-type: none"> • PCT Trainers • Case Management • Community Services
Year 2	d. Develop a sustainable Person-Centered Services training plan that might include: <ul style="list-style-type: none"> • Workshops in sections and topics to address parts of the planning process. • 2-Day Person-Centered Thinking training offered 2x annually for new hires and service providers. • Develop and implement a series of workshops to train staff on the new IPP, the person-centered planning process and integrating person-centered thinking skills. • Develop and implement sustainable online Training for DSP staff on person-centered thinking as it relates to Home and Community-Based Services. • Build capacity to continue to deliver Person-Centered Thinking training. Reinvigorate Person-Centered Thinking Trainers Circle and establish Internal Training Advisory Group across departments. e. Create media for person-centered thinking education (self-paced info session in Learning Management System (LMS)). f. Collaborate with Work Culture group and others to explore how to integrate person-centered approaches across organizational processes.	



Operational Focus Area 1 – Performance Contract Measures

Defined as:

Measure that demonstrate RCEB’s performance around quality of life issues compared with state averages.

What we want to achieve:

That RCEB meets or exceeds statewide average, better than baseline, or meets DDS standard.

How will we know we are making progress?

Metric	BASELINE (Draft June 2024)	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
a. Fewer children live in large facilities (more than 6 people). PC*	0.00%	Maintain 0.00%	Maintain 0.00%	Maintain 0.00%
b. More children live with families. PC*	99.58%	Maintain or increase percentage	Maintain or increase percentage	Maintain or increase percentage
a. Fewer consumers live in developmental centers. PC*	0.06%	Maintain or decrease percentage	Maintain or decrease percentage	Maintain or decrease percentage
c. More adults live in home settings. PC*	80.44%	Maintain or increase percentage	Maintain or increase percentage	Maintain or increase percentage
d. Fewer adults live in large facilities (more than 6 people). PC*	1.44%	Maintain or decrease percentage	Maintain or decrease percentage	Maintain or decrease percentage

PC*= Performance Contract Measure



Strategic Actions – Performance Contract Measures

Measure	Actions
<p>a. Fewer children live in large facilities (more than 6 people).</p>	<ul style="list-style-type: none"> Almost all children in facilities larger than six beds are adolescents that are receiving treatment in mental health facilities. RCEB will work with families/guardians of children who are ready to move to other housing options such as returning to the family home or moving into more natural living environments. Collaborate with local counties to support transitions of our mutual children in foster care residing in large facilities. Continue our work on Memorandums of Understanding with our two counties to support these efforts Continue our collaborative work with the counties to assure children in foster care receive adequate resources Assure that county social workers are aware of new EBSH homes and CCHs for duallyserved children. Hire a fulltime AB 2083 Children and Youth System of Care Coordinator to support children dually served by RCEB and Foster Care.
<p>b. More children live with families.</p>	<ul style="list-style-type: none"> Provide ongoing case management support to families and consumers. Include training for case managers that focuses on the importance of children residing with families and supports and services available to support them. Support access to an array of family supports through referral and advocacy with generic services such as school districts Medi-Cal and In Home Support Services. Provide crisis intervention services through RCEB’s mobile crisis team, YAI START, and the Children’s Crisis Home. Work with the Department of Developmental Services (DDS) in the use of intensive wrap around services including CAST as part of the DDS Safety Net for all children. Train case managers on new materials including service catalog and web-based information to share on services. Provide community trainings on these materials. Increase the number of wrap around service providers available to support families.



Strategic Actions – Performance Contract Measures continued

Year	Actions
<p>c. Fewer people live in developmental centers and more adults live in supported living settings.</p>	<ul style="list-style-type: none"> Continue to meet quarterly with SLS providers. Provide two living options workshops a year for families and consumers. Continue to orient case management staff to SLS and availability for those over 18. Offer an annual opportunity for all SLS providers to meet with transition age and adult case managers. Continue to work closely with local housing agencies and other partners to increase accessible and affordable housing. Create a housing specialist position to increase partnerships with housing developers and on housing issues. Continue to facilitate opportunities for confidential housemate/ roommate searches. Continue to provide information on living options including SLS at Transition Fairs throughout the community annually. Share affordable housing resources with individuals and families through social media and SLS providers. Create a referral system to SLS providers so individuals are aware of all providers that are available to support them to successfully live in the community.
<p>d. More adults live in home settings.</p>	<ul style="list-style-type: none"> Increase efforts to establish coalitions that will advocate for the development of affordable housing i.e., Section 8 vouchers, affordable housing set asides. Hire a housing specialist to focus on housing issues including those experiencing homelessness. Provide information to consumers on affordable housing options as they become available. Continue to work with local housing agencies to develop inclusive, accessible and affordable housing. Share housing resources available with all interested through a list serve.
<p>e. Fewer adults live in large facilities (more than 6 people).</p>	<ul style="list-style-type: none"> In residential services orientation, emphasize the need for homes that provide services to fewer than six residents. Continue to encourage the conversion of six-bed homes to 4-bed homes. Consistent with the CMS final setting rule, support larger providers to apply for HCBS funding to reduce the number of people residing in homes.



Operational Focus Area 2 – Fiscal Compliance

Defined as:

Audits, Budget, Client Evaluation Report (CDER/Early Start Report (ESR), and Intake.

What we want to achieve:

Complaince with outcomes expected from DDS.

How will we know we are making progress?

Metric	BASELINE (Draft June 2024)	YEAR 1 by June 2025	YEAR 2 by June 2026	YEAR 3 by June 2027
a. Unqualified independent audit with no material finding(s) PC*	Yes			
b. Substantial compliance with DDS fiscal audit. PC*	Yes			
c. Operates within OPS budget. PC*	Yes			
d. Certified to participate in waiver PC*	Yes			
e. Compliance with Vendor Audit Requirements per contract, Article III, Section 10. PC*	Met			
f. CDER/ESR Currency. PC*	99.33%			
g. Intake/assessment and IFSP time lines (0 -2)	(need to get from ESR)			
h. Intake/assessment time lines for consumers ages 3 and above. PC*	70.53%			
i. IPP Development (WIC requirements). PC*	94.41%			
j. IFSP Development (Title 17 requirements). PC*	90.1%			

PC*= Performance Contract Measure

Strategic Focus Areas

Process Improvement

Work Culture

Diversity, Equity, Inclusion, Belonging (DEIB)

Communication and Engagement

Person-Centered Services Planning

Operational Focus Areas

Performance Contract Measures

Fiscal Compliance

Strategic Actions – Fiscal Compliance

Measure	Actions
a. Unqualified independent audit with no material finding(s)	<ul style="list-style-type: none"> RCEB will have an unqualified independent audit with no material findings.
b. Substantial compliance with DDS fiscal audit.	<ul style="list-style-type: none"> Based on DDS internal document criteria RCEB will be in compliance with the DDS fiscal audit.
c. Operates within OPS budget.	<ul style="list-style-type: none"> Actual expenditures plus late bills will not exceed OPS budget.
d. Certified to participate in waiver.	<ul style="list-style-type: none"> Based on most recent waiver monitoring report in January 2021, RCEB will continue to be certified to participate in the waiver.
e. Compliance with Vendor Audit Requirements per contract, Article III, Section 10.	<ul style="list-style-type: none"> RCEB will continue to be in compliance with vendor audit requirements per contract, Article III, Section 10.
f. CDER/ESR Currency.	<ul style="list-style-type: none"> RCEB will maintain CDER/ESR currency for status 1 and 2 consumers
g. Intake/assessment and IFSP time lines (0 -2)	<ul style="list-style-type: none"> RCEB will meet timelines for intake/assessment and IFSP for 0-2, measured through the ESR data.
h. Intake/assessment time lines for consumers ages 3 and above.	<ul style="list-style-type: none"> Intake/assessment time lines will be met for consumers age 3 and above and tracked through CMF calculated by subtracting the status date from the CMF date.
i. IPP Development (WIC requirements).	<ul style="list-style-type: none"> RCEB will meet timelines for IPP development and review per Welf. & Inst. Code section 4646.5 (c)(3).
j. IFSP Development (Title 17 requirements).	<ul style="list-style-type: none"> RCEB will meet timelines for IFSP development and review per Title 17 requirements and measured through ESR data.



GLOSSARY

Baseline

Data starting points used for comparisons.

CalWIN Electronic Records Management System (CERMS)

An online, real-time computer program that supports the administration of welfare in California.

Community Based Organizations (CBO)

CBO refers to organizations aimed at making desired improvements to a community's social health, well-being, and overall functioning.

Community Training and Education Committee (CTEC)

A committee of RCEB staff who meet the identified training needs of service providers.

Community resources

The range of services is available to everyone who lives in that community.

Compliance performance measures

Measures used to determine if the regional center is serving people in the way it is required by law.

Direct Service Professionals (DSP)

A DSP is a person who provides direct care and support to people with disabilities. They assist individuals with intellectual and developmental disabilities, physical disabilities, and mental health challenges.

Department of Developmental Services (DDS)

DDS, also known as The Department, is the agency through which the State of California provides services and supports to individuals with developmental disabilities.

Diversity, Equity, Inclusion, Belonging (DEIB) Diversity, Equity, Inclusion (DEI)

DEI is any policy or set of initiatives designed to make people of various backgrounds feel welcome and ensure they have support to perform to the fullest of their abilities in the workplace.

Financial Management System (FMS) Providers

A FMS provider supports individuals who choose to get their Regional Center Services through the Self-Determination Program (SDP.)

Goal

A goal is the desired result that a group of people envision, plan and commit to that will be achieved in a defined amount of time.

Human Resources (HR)

HR is the department that manages an organization's employees and ensures their well-being and performance.

Individual Program Plan (IPP)

An IPP is an Individualized Program Plan that helps you get services and supports to live independently and participate in the community.

Language Access and Cultural Competency (LACC)

Funds that are available to improve the overall individual served and family experience and to help facilitate more consistent access to information, services, and supports, with particular focus for individuals who are multi-lingual, monolingual, and diverse cultural groups.



GLOSSARY

Lanterman Services

The Lanterman Act is a California law that promises services and supports to people with developmental disabilities and their families.

Learning Management System (LMS)

A Learning Management System is a platform that enables online education and eLearning by providing a framework to create, manage, and deliver learning content.

Metric

A system or standard of measurement used for assessing, comparing, and tracking performance or production.

Purchase of services expenditures (POS)

The amount of money spent by the regional center to purchase services and how it is distributed between different age, ethnic and diagnosis groups.

SANDIS

San Diego Information System. The software used by regional centers to gather information about the people they serve and the services they are receiving.

Strategic plan

Is a document organizations uses that identifies their goals, the strategies to accomplish those goals and the method used to evaluate progress.

Uniform Fiscal System (UFS)

The statewide information technology system used for billing and case management

