

Self-Determination Advisory Board Meeting Minutes September 3, 2025

Attendance: See attached

Materials: HSRI presentation and Acumen presentation

Nancy Alterio called the meeting to order and requested a motion to accept the 6.4.25 minutes.

First Motion: Robin Foley

Second Motion: Catherine Burke

DDS Updates: Sarah Peterson, Commissioner

- SDAB Meeting to be held virtually- will allow for more participation statewide.
- 40 Broad Street- new location for DDS Central Office. It is a nice space that is co-located with several EHS agencies- MassAbility, DYS, MCB, MCDHH, EHS Human Resources, and EHS IT. There are many opportunities for collaboration among the agencies. It is also close to Ashburton Place and the State House.
- I met with our Self-Direction Leadership Team last week- it was a good opportunity to discuss how things are going, their updates, and input as to how CO can better support the field.
- Last week I met with the last of the 23 area offices. It was an amazing and important time to spend with staff and Support Brokers. They talked about the challenges with enrollments and transition; many continue to be engaged and excited about what they do.
- Welcome to our two new Board members, Frank Galligan and Deborah Flaschen.
- We have been reviewing current members and appointments/ limits. The term of members is 3 years and we discovered that many members' terms have expired. We recognize that these members are very engaged in current work on the board, and do not want to disrupt this. We will begin discussing and updating membership after January. We welcome members to continue to attend and engage if they wish. The overall board membership should be represented by the communities and individuals that we support. More to come on this.

Independent Facilitator: Jaclyn Grant, Director of Self-Directed Models

There were two bidders initially on the Specialized Training RFR. This is a rolling RFR, so agencies interested in developing/ providing training for the Department can continue to apply. Colleen and I will be reviewing and qualifying agencies. Once completed, we hope to be able to post the RFQ which will be the specific request for a proposal for the development of the Independent Facilitator curriculum. We hope to have some updates in the coming weeks.

SDAB Membership Survey: Jaclyn Grant, Director of Self-Directed Models

Jaclyn provided an update on the membership survey that was distributed to Board members. The feedback included:

Topics of Interest

1. How to connect participants who self-direct their services, stretch resources, and sharing resources

- a. We would like to explore partnering with MASS Advocates Standing Strong to host a social media page for individuals and families who self-direct to connect, share ideas, coordinate community meet ups, etc. Once the social media page is set up, we plan to do outreach to those in self-directed services to let them know it is available in addition to posting the link to the page on our social media pages and in our newsletter.

2. Structure of self-direction within DDS—too many touchpoints and misinformation being provided. It could be online and centralized.

- a. DDS is exploring creating a public facing SharePoint site which will have information and resources on self-directed services. We currently have an internal SharePoint site for area office and regional staff to access training, information, forms, policies, and guidance self-directed services. Please remember the Regional Self-Direction Managers are always available for consult.

3. Opportunities to improve self-directed services as related to Real Lives Law and Regulations

- a. We welcome feedback on how we can improve self-directed services and make them more accessible to everyone. The work we have done so far as it relates to the Real Lives Law includes:
 - i. Independent Facilitator-work continues to get this service up and running for people self-directing their services. We are in the process of identifying a vendor to help develop the training.
 - ii. Eligibility-everyone who receives adult services from us is eligible to self-direct their services. The Regional Self-Direction Managers provide multiple info sessions each month and have added Spanish info session as well. They are looking to expand to other languages as well. We have support brokers in each area office to speak with individuals and their families about self-directed service options in addition to the information available on our website.
 - iii. We have a mandatory training for all DDS staff on the basics of self-direction. The Regional Self-Direction Managers provide an annual Soup to Nuts training series which is geared towards support brokers and supervisors, but all DDS staff are welcome to join to learn more about the service models. They are looking to expanding this training series to twice a year and have a recorded version available to people on demand. Statewide training opportunities are offered as well.
 - iv. Budget Development- we continue our work with AAIDD and HSRI to roll out the new SIS-A assessment which will help us develop a support needs level framework with associated budget ranges for individuals who self-direct their services. There is a formal budget appeal process in our self-direction regulations. We provided training and Q&A sessions with area office and regional staff on the regulations when they were promulgated.

- v. Budget communication- we have a cost calculator tool that is used with individuals and their families to communicate the budgets. Additionally, area office staff are sending people their budget information in writing once it has been approved by the Area Director.
 - vi. Information and Training for Individuals- our flyer is sent out annually with ISPs to inform people of self-directed services. Transition coordinators are equipped with basic knowledge and connect individuals and their families with the area office Support Broker for more information if they are interested. Participant Toolbox has been developed and is available on our website.
- 4. Discussion/acknowledgement of individuals who are self-directing and have higher support needs
 - a. We would like to highlight people who are self directing their services regardless of their support need level in our monthly newsletter. We are hoping that sharing stories of people with all different abilities may give others ideas on how self-direction may work for them or their loved one. Please reach out to me if you or someone you know would like to share their story.
- 5. Equitable Budgets
 - a. The SIS-A will address budget equity and consistency for everyone in a self-directed service model. We, along with HSRI, will continue to keep the board updated on the work that is being done.
- 6. Support for individuals who self-direct their services
 - a. We would like to hear what kind of support folks are looking for. More support from their support broker, creating a self-direction community, help with administrative tasks associated with managing self-direction?
- 7. Expanding training on self-direction to all DDS staff, both initially and ongoing
 - a. We provide basic training to all DDS staff on self-directed services, which is mandatory to complete upon hire. We are looking to expand this and make it an annual requirement. Additionally, we will be working on putting together training for senior leadership at the area office and regional level as their role is very different from the support brokers and supervisors who work with participants and families.

Additional Comments

- 1. Should look to create a role to help individuals/families hire staff
 - a. This is something that the Independent Facilitator can assist with. They can work with the individual/their family to develop job descriptions, post jobs on recruitment websites, provide support through the interviewing process, help the individual/family determine pay rates, and develop employee performance reviews.
- 2. AWC and DDS Brokers implementing rules rather than just keeping regs set and being subjective based on individual's needs
- 3. DDS should take action before the next meeting to improve the ability of remote attendees to join, hear and participate in meetings

4. DDS has put extensive and successful efforts into supporting self-direction, which you should promote more extensively to your participants
5. The role that is being added is not helping the true problem of SD services which has always been staffing
 - a. Unfortunately, we remain in a staffing crisis across all services. We do offer free access to all participants/families for the recruitment website, Rewarding Work. We meet regularly with TILL, who manages the site, and they continue to report that new providers are being added each month.
6. Any additions to SD should keep in mind Real Lives Law
7. We should be stewards of keeping self-direction free and not become programmatic
 - a. While we do our best to be flexible, we also have to be responsible stewards of taxpayer dollars. There are also federal rules and regulations which are not determined by DDS. We acknowledge that there are inconsistencies statewide with how self-direction is managed and we are working towards more consistency with additional training opportunities, increased involvement of Regional Self-Direction Managers with budget determinations, and continued support/feedback from you all as advisory board members. If you are struggling with your area office, the Regional Self-Direction Managers are also available for consultation.

Questions/Comments:

Ed Underwood- Regarding Commissioner Peterson's comments about possibly imposing term limits, the issue I initially raised that led to her comments was the need to have some attendance/participation expectations/standards for SDAB members. I noticed that there were several SDAB members who had not attended a single meeting for years. While the Real Lives Law does specify appointment for 3-year terms, it does not mention anything about a limit on the number of terms someone can serve. My point was not to limit how long someone can serve, but rather to make sure that board members are active and actually participate.

Commissioner Peterson: We will leave this to the attorneys to advise on this.

Deb Flaschen- I'm delighted to be part of the Board and have been following the work of the Board for 9 years. The next important step is to develop policies that bind Area Offices so that there is more alignment across the areas and Support Brokers.

Robin Foley- policies- turn around time, reimbursements being processed- things will be processed within 48 hours, etc... What do you mean by policies.

Deb Flaschen- It was reiterated several times about what self-direction should be or not be during development of regulations. What should DDS policy be- clarity. Not necessarily turnaround time. Broader questions.

Liz Fahey- It would be helpful as a policy that participants can access goods and services until a staff person is in place. Other concerns seen: budgets may or may not be presented consistently and how funding being used. Find myself discussing whether it is a rule or not with Area Offices. Regional

Managers help facilitate this, but not always part of that conversation. Where does this information live?

Dr. Keshrie Naidoo: appreciated update on Independent Facilitator. Can this be bypassed and Ifs used until the RFR/ RFQ process is completed?

Jaclyn Grant: We have shared that we do have a personal agent code for folks to use until the Independent facilitator is up and running. It's hard to give a timeline of when this will be available as it is a moving target.

Commissioner Peterson: In the Area Offices, we have several people who are new to these roles. One of our take aways is that we need training opportunities for these new managers.

Margaret Abrams: most discussion centers around higher functioning folks. We don't hear about a lot about these support needs. My son- hasn't been in a day program for many years- very frustrating.

HSRI Path Forward Update: Colleen Kidney, Human Services Research Institute

HSRI presented on the community engagement portion of the project. Please see attached presentation.

Questions/Comments:

Ed Underwood- Does this Supports Budget Framework project include traditional services? It should not be focused on just self-directed services but should also be looking at traditional services in terms of equivalency.

Deb Flaschen- I'm concerned that the HSRI project is not addressing budgets for both traditional services and self-directed services.

Commissioner Peterson: The project started on this subset first. Areas are looking at the SIS-A for everyone.

Additional folks for the engagement for consideration are ARC and Acumen

Reach out to Jaclyn for interest in engagement groups.

Acumen presentation: Andrew Coleman, Liz Keifer, Jabetsky Edouard, and Amorissa McQuarters, Acumen Fiscal Agent

Andrew introduced Team, announced Amorissa in new position of Executive Director. Jabetsky as a lead role as a Supervisor, supporting the agents and training.

Acumen- we went live with Enhanced Caseworker profile- hopefully this will result in more efficiency. Enrollment moving to DocuSign- processed 200+ enrollments since going live. This should prevent the back and forth to get paperwork correct. DocuSign helps with this as it prefills with less corrections needed.

See attached presentation for further details.

Questions/Comments:

Amorissa: We will take a deeper dive

Robin- Why was DCI portal messaging used for statement delivery/storage rather than having a permanent place in the DCI portal where statements would be stored in an organized fashion like other organizations do with their statements?

Amorissa: For security reasons. No quick link.

Robin- It would be really helpful for families to have a permanent location in the DCI portal where statements could be accessed, rather than just having them mixed in with historical messages that are subject to deletion.

Public Comment

Dianne Huggon: closed captioning would be helpful for those with hearing loss. Also, can the presentations be recorded?

Andrew Coleman: Acumen can make a stand alone recording of the presentation for the website

Jaclyn to be looking at turning on close captioning if possible.

Commissioner Peterson- In response to those whose voices have not been heard or those turned down for SD, please reach out to Jaclyn with those names. There is an opportunity to have some of these people join the board.

Can use screen shots as part of training, making them accessible for everyone.

Nancy Alterio asked for a motion to adjourn

First Motion: Deb Flaschen

Second Motion: Anne Fracht

Motion passed unanimously.

Respectfully submitted,

Colleen Mulligan

December 3, 2025- continue with virtual for December given the weather.