**Self-Determination Advisory Board**
**Meeting Minutes – June 3, 2026**

## Call to Order and Roll Call

Nancy Alterio (Executive Director, CPPD; Board Chairperson) called the meeting to order. Jaclyn Grant conducted the roll call — see attached attendance sheet.

## Approval of Minutes

The minutes of the March 4, 2026 meeting were approved as presented (Motion: Robin Foley; Second: Margaret Abrams; approved unanimously).

## Department of Developmental Services Updates

**Presented by:** Sarah Peterson, Commissioner

- The Board welcomed new member Jonathan Gardner.
- DDS contracted with Applied Self Direction to develop the Independent Facilitator curriculum.
- **Budget:** The FY2027 budget is before the House–Senate conference committee and includes additional funding for the DESE Residential Prevention Program. DDS continues to monitor potential federal MassHealth funding reductions.
- **State Auditor's Report:** The annual report (published mid-April, covering FY2021–FY2024) findings have been addressed. DDS is adding annual self-direction notification to its new case management system (expected October), will include a self-direction flyer link with the ISP invitation letter, and requires all staff to complete an annual self-direction overview.

## SIS-A / Budget Allocation Methodology Update

**Presented by:** Colleen Kidney, Human Services Research Institute (HSRI)

- HSRI presented an update to the Budget Allocation Methodology (see attached presentation).
- Members discussed data showing the two highest-need participants are in self-direction; members noted self-direction may be particularly effective for complex support needs. Proportions may shift as more participants are assessed.
- Verification is underway with DDS during June and July, and service-utilization analysis is in progress. Preliminary corridors are expected in the summer, with recommendations anticipated in the fall.

## Annual Budget Notification Letter

**Presented by:** Jaclyn Grant, Director of Self-Directed Service Models

Beginning in July, participants in the Participant Directed Program (PDP) and Agency With Choice (AWC) will receive a standardized letter stating the annual budget discussed with their Support Broker. The letter accompanies the Individual Support Plan and includes instructions for appealing to the Regional Director within 30 days.

- Jaclyn clarified the notification applies only to self-directed services, not traditional services; budget questions should be directed to the Support Broker and Area Office.
- A member's suggestion to provide a plain-language version of the letter will be brought forward for further discussion.

## Fiscal Management Services Update

**Presented by:** Colleen Mulligan, Assistant Commissioner, Assessment/Community Services

- The current Acumen contract expires June 30, 2027. The RFR was posted in March 2026; 8 responses were received and are under review, to be followed by portal demonstrations.
- A contract award is anticipated in October 2026, allowing up to a nine-month transition before the anticipated July 2027 implementation.
- The updated procurement adds requirements for plain-language and multilingual training; a dedicated, responsive customer-service team; regular performance reporting; a user-friendly portal; QA processes; and liquidated-damages provisions.
- Discussion: stakeholder feedback informed the procurement, and DDS intends to apply lessons learned from recent technology transitions. A member requested the ability to approve multiple timesheets at once; DDS will follow up with Acumen.

**National Annual Self-Direction Conference**

**Presented by:** Jaclyn Grant, Director of Self-Directed Service Models

Jaclyn summarized the national self-direction conference, which convened state representatives, participants, families, fiscal management service providers, and other stakeholders. Session highlights:

- **Supported Decision-Making —** preserves individual choice and control through trusted supporters, promotes long-term sustainability, and underscores the need for individual and family training.
- **Layers of Support —** brainstorming on nonprofit-developed supports, including family transition programs and support networks ("protector pods").
- **Equity and Cultural Responsiveness —** a Brandeis University/HSRI study (with Massachusetts participation) found materials did not resonate across all communities; discussion emphasized transcreation over word-for-word translation and inclusive, representative development.

**Public Comment**

- A recommendation was made to standardize documents across DDS regions, noting regional modifications create inconsistency, and to establish a central location where participants, families, and stakeholders can access current self-direction and ISP documents.

**Next Meeting and Adjournment**

The next meeting will be held Wednesday, September 2, 2026.

The meeting was adjourned (Motion: Anne Fracht; Second: Deb Flaschen; approved unanimously).

Respectfully submitted,
Colleen Mulligan