



WELCOME



Harbor Developmental
Disabilities Foundation
September 16, 2025



SEPTEMBER MEETING OF THE BOARD OF TRUSTEES

TUESDAY, September 16, 2025 @ 6:00 pm
Torrance Location | 21309 Main Board Room

A G E N D A

- 1. CALL TO ORDER & INTRODUCTIONS.....LAVELLE GATES, President**
- 2. PUBLIC COMMENT**
- 3. MINUTES OF THE *JULY 15, 2025* MEETING.....DR. JAMES FLORES, Secretary**
- 4. TREASURER’S REPORT.....FU-TIEN CHIOU, Treasurer**
- 5. EXECUTIVE REPORT*PATRICK RUPPE, Executive Director**
 - California State Budget *update*
 - Strategic Plan Progress *report* | 4th Quarter Executive Summary | 4th Quarter Detailed Summary | Annual Progress Report
 - Board Approval: Strategic Planning review | *update* to Mission/Vision/Guiding Values
 - Board Approval: Harbor Help Fund Donation | Hearts for the Holidays
 - ARCA Academy November 2025
 - Presentation: “National Core Indicators (NCI) & Other Harbor Regional Center Surveys/Indicadores Basicos Nacionales & Otras Encuestas del Centro Regional Harbor” by Thao Mailloux, Director of Strategic Communications & Engagement
- 6. COMMITTEE REPORTS:**
 - a) AUDIT.....LAURIE ZALESKI, CHAIRPERSON**
 - b) BOARD DEVELOPMENT.....JOE CZARSKE, CHAIRPERSON**
 - c) BOARD PLANNING*DAVID GAUTHIER, CHAIRPERSON**
 - d) CLIENT ADVISORY.....PATRICIA JORDAN, CHAIRPERSON**
 - e) CLIENT SERVICES.....DAVID GAUTHIER, CHAIRPERSON**
 - f) COMMUNITY RELATIONS.....ANN LEE, Ph.D., CHAIRPERSON**
 - g) RETIREMENT.....FU-TIEN CHIOU, CHAIRPERSON**
 - h) SELF DETERMINATION ADVISORY.....ANTOINETTE PEREZ, LIAISON**
 - i) SERVICE PROVIDER ADVISORY.....ANGELA RODRIGUEZ, CHAIRPERSON**
- 7. ADJOURNMENT: 8:00 PM**

*indicates action



MINUTES



Dr. Jim Flores,
HDDF Secretary



**MINUTES OF THE JULY 15, 2025 MEETING OF THE BOARD OF TRUSTEES
OF THE HARBOR DEVELOPMENTAL DISABILITIES FOUNDATION**

BOARD PRESENT:

Mr. Fu-Tien Chiou, *Treasurer*
Mr. Joe Czarske, *President*
Dr. James Flores, *Secretary*
Mr. LaVelle Gates, *Vice-President*
Mr. Ramon Gonzalez, Board Member
Mr. Jeffrey Herrera, Board Member
Ms. Patricia Jordan, Board Member
Ms. Ann Lee, Ph.D, Board Member
Mr. Chris Patay, Board Advisor
Ms. Angela Rodriguez, Board Member

BOARD ABSENT:

Mr. Ron Bergmann, Board Member
Mr. Gordon Cardona, Board Member
Ms. Laurie Zaleski, Board Member

STAFF PRESENT:

Mr. Patrick Ruppe, Executive Director
Ms. Judy Wada, Chief Financial Officer
Ms. Elizabeth Garcia-Moya, Director of Community Services
Ms. Eun Kim, Director of Intake & Clinical Services
Ms. Thao Mailloux, Director of Strategic Communications & Engagement
Ms. Judy Samana Taimi, Director of Adult Services
Ms. LaWanna Blair, Director of Early Childhood Services
Ms. Mary Hernandez, Director of Case Management Support Services
Ms. Antoinette Perez, Director of Children's Services
Ms. Jennifer Lauro, Executive Assistant
Mr. Jesus Jimenez, Executive Office Department Assistant

INTERPRETER:

Mr. Fernando Nunez, LRA Spanish Interpreter

GUESTS:

Ms. Monserrat Palacios, DDS
Mr. Paul Quiroz, Service Provider
Mr. Vincent K. Winston, SEIU Rep
Ms. Sofia Garcia, HRC Staff
Mr. Brian Carrillo, HRC Staff
Ms. Lesly Nuno, HRC Staff
Ms. Analyssa Luna, HRC Staff
Ms. Lisa Hobart, HRC Staff
Mr. John King, HRC Staff
Mr. Christian Chacon, HRC Staff
Ms. Cherryl Julian, HRC Staff
Ms. Cassie Forrest, HRC Staff
Ms. Josephina Cunningham, HRC Staff
Ms. Becky Garduno, HRC Staff
Mr. Jimmy Silvestre, HRC Staff
Ms. Savannah Pio, HRC Staff
Ms. Erika Godoy, HRC Staff
Ms. LaMeikka Bagsby, HRC Staff
Ms. Jessica Vega, HRC Staff
Ms. Melissa Tirado, HRC Staff
Ms. Gizet Arellano, HRC Staff
Ms. Isabel Castellanos, HRC Staff

CALL TO ORDER

Mr. Czarske called the Board to order at 6:02 p.m.

PRESIDENT'S REPORT

Mr. Czarske welcomed Board members, guests and staff, then led in the Pledge of Allegiance.

Mr. Czarske introduced Board Member Daivd Gauthier who read Harbor Regional Center's Mission and Vision Statement.

Mr. Czarske took roll call of Board Members and a quorum was established.

Mr. Czarske reminded the Board that we do not meet in August. Our next regular business meeting will be at Harbor's Long Beach location in conference room LB1.

Mr. Czarske reminded the Board that our annual Board Retreat and Recognition Dinner will be held on Saturday, October 11, 2025 at the Torrance location in the main board room. The retreat will begin at 9:00 am and end at 3:00 pm. The retreat topic will be on 'Strategic Plan Refresh: Evaluating Progress and Future Alignment'. The recognition dinner will follow at 6:00 pm with details to follow as the date approaches.

CLOSED SESSION – OPEN 6:10 PM

Mr. Czarske announced that we will have a Closed Session tonight to discuss: 1) Labor Contract Negotiations; and 2) Employee Salaries and Benefits. At this time Mr. Czarske made a motion to ask the Board to close the public board meeting and go into closed session.

Mr. Gauthier moved to close the public board meeting and go into Closed Session and Mr. Czarske seconded the motion. The full Board adjourned to the Executive Dining Room at 6:10 pm.

CLOSED SESSION – ADJOURN 6:50 PM

Mr. Czarske made a motion to ask the Board to conclude Closed Session on: 1) Labor Contract Negotiations; and 2) Employee Salaries and Benefit and return to the public Board meeting.

Mr. Czarske moved to close the Closed Session and return to the public Board meeting and Ms. Rodriguez seconded the motion. The full Board adjourned to the main Board room to continue the public Board meeting at 6:50 pm.

PUBLIC COMMENT

Mr. Czarske advised that public input was next on the agenda. Mr. Czarske stated that he will call upon each person who submitted a Public Comment Request form to address the Board and requested that he or she limit their comments to two minutes in order to accommodate everyone.

Mr. Czarske indicated that we had received two (2) Public Comment Request forms.

PRESENTATION OF MINUTES

Dr. Flores presented the draft minutes of the May 20, 2025 meeting of our Board which were included in the Board packet and posted for the general public on the Harbor website. **The MINUTES OF THE MAY 20, 2025 BOARD MEETING were received and filed.**

PRESENTATION OF FINANCIALS

Mr. Chiou reviewed the following financial statements, which were received and filed:

- Harbor Regional Center Monthly Financial Report Fiscal Year 2024-25, dated April 2025
- Harbor Regional Center Functional Expense Summary, dated April 2025
- Harbor Regional Center POS Contract Summary, dated April 2025
- Harbor Regional Center Line-Item Report, dated April 2025

- Harbor Regional Center Monthly Financial Report Fiscal Year 2024-25, dated May 2025
- Harbor Regional Center Functional Expense Summary, dated May 2025
- Harbor Regional Center POS Contract Summary, dated May 2025
- Harbor Regional Center Line-Item Report, dated May 2025

EXECUTIVE REPORT

1. BOARD MEMBER APPRECIATION | H.U.F. AWARD | LAVELLE GATES “FATHERHOOD FOREVER”:

Mr. Ruppe called the Board’s attention to Mr. LaVelle Gates, President of the Board, who was honored with the “Fatherhood Forever” Award at the Judge Mablene Foundation’s Honoring Unsung Fathers event. Mr. Ruppe informed this meaningful award celebrates dads who remain a steady, loving presence in their children’s lives out of deep love and commitment. Mr. Ruppe, the Board and Staff congratulated Mr. Gates on this well-deserved recognition!

2. BOARD APPROVAL: FISCAL YEAR 2025-26 HARBOR BOARD COMMITTEE ROSTER:

Mr. Ruppe referred the Board to the proposed fiscal year 2025-26 Board Committees Roster and Chairs that was provided in their Board packet and called for a vote to approve the updated roster.

Mr. Chiou moved to approve the FY 2025-26 Board Committee and Chairs Roster and Ms. Jordan seconded the motion, which was unanimously approved by the Board with no opposition or abstention.

3. CALIFORNIA STATE BUDGET update:

Mr. Ruppe provided the Board with a detailed summary of the 25/26 State Budget, its impact on the Department and Regional Centers, on Health & Medi-Cal Changes and on IHSS Reductions.

4. LEGISLATION TO WATCH: AB 1208:

Mr. Ruppe advised the Board of AB 1208, referred to as California Developmental Disability Services Quality, Performance and Outcomes Act of 2025 and how it subjects regional centers to the Public Records Act. Mr. Ruppe summarized the key highlights of this legislation and how it will affect Harbor.

5. REGIONAL CENTER PERFORMANCE FISCAL YEAR 2023-24:

Mr. Ruppe referred the Board to a slide from the Department of Developmental Services that showed the recognition and payment amounts by measure and regional center for fiscal year 2023-24 and shared how Harbor performed exceedingly well in this period as a top performing regional center in three (3) of the six (6) focus areas, which include: Early Start, Employment, Equity and Cultural Competency, Individual and Family Experience and Satisfaction, Person-Centered Services Planning and Service Coordination and Regional Center Operations. As a result of Harbor’s performance, Harbor received over one million dollars in incentive funds, of which 100% was distributed back to staff to recognize their efforts. The Board acknowledged this achievement with applause and thanks to Harbor staff.

6. INSURANCE SCHEDULE renewal:

Mr. Ruppe referred the Board to the Insurance Schedule that was provided in their Board packets and advised that this is the time to renew with a one million dollar increase to our umbrella policy and with director and officer insurance coverage at two million dollars.

7. HARBOR'S SERVICE AREA expansion:

Mr. Ruppe informed the Board that Harbor's service area has expanded to include the entirety of the City of Carson. This is due to our contract with DDS noting that Harbor covers the Torrance Health District, which is located in the City of Carson. Mr. Ruppe informed that our Memorandum of Understanding (MOU) with South Central Los Angeles Regional Center (SCLARC) has been updated to reflect this expansion effective July 1st and that new applicants for services or to become a service provider will be directed to Harbor as of that time. Additionally, if an individual or family is in the new Harbor area and wishes to move over to Harbor they can request the change and will process as a normal transfer between centers. Providers, however, will be required to stay with the center that is the original vendoring center.

8. HARBOR'S ORGANIZATIONAL STRUCTURE change:

Mr. Ruppe announced a change to Harbor's organizational structure, changing the Department of Information and Development to the Department of Strategic Communications and Engagement under Director Thao Mailloux. This change demonstrates Harbor's commitment to improving our information and communications and our community engagement activities, which are two (2) key areas of Harbor's Strategic Plan.

9. HARBOR'S MAIN BUILDING GRAND OPENING recap:

Mr. Ruppe called upon Thao Mailloux, Director of Strategic Communications and Engagement who presented photos and a short video of Harbor's new main building grand opening that occurred on June 24, 2025.

10. PRESENTATION: HARBOR & DDS AS CONSERVATOR, ROLES & RESPONSIBILITIES

Mr. Ruppe called upon Judy Taimi, Director of Adult Services, who made a presentation to the Board on the roles and responsibilities of Harbor and DDS as conservator.

COMMITTEE REPORTS

A. ARCA

Mr. Czarske summarized the key highlights of the June meetings that included an update on ARCA's plan to standardize orientation and onboarding for Board members. Mr. Czarske also provided information on the upcoming ARCA Academy occurring this November 14th and 15th at Alta Regional Center and encouraged Board members to attend if available.

B. BOARD PLANNING

Mr. Ruppe announced that the Board Planning Committee will have a meeting on August 12th via zoom to review Harbor's mission, vision and guiding values in preparation for our October Board Retreat and encouraged all Board members to

attend to provide any recommendations for the full Board's consideration at the September Board meeting.

C. CLIENT ADVISORY

Ms. Jordan, former Chair of the Committee, congratulated Mr. Gauthier, who was elected the new Chair for the coming fiscal year and reported on the May 14th meeting that focused on topics for the new fiscal year, review of committee bylaws and community outreach efforts. Next meeting is schedule for August 13, 2025.

D. CLIENT SERVICES

Ms. Jordan, Chair of the Committee, reported that the Committee met on May 27, 2025, where the Committee reviewed Harbor's current service policy for the Early Childhood Services Policy and Medical/Dental Services Policy. Next meeting is scheduled for July 22, 2025.

E. SELF-DETERMINATION ADVISORY

Ms. Perez, Liaison for the Committee, advised the Board that the Self-Determination Advisory Committee continues to meet monthly and provided an update on the May and June meetings. The Committee does not meet in July; the next meeting is scheduled for August 6, 2025.

F. SERVICE PROVIDER ADVISORY

Ms. Rodriguez, Chair of the Committee, informed that the Committee met on June 3, 2025 and focused primarily on committee members' responsibilities and agreements and SPD updates and success stories. Next meeting is scheduled for August 5, 2025.

ADJOURNMENT 8:04 p.m.

Mr. Czarske thanked all those who participated in our Board meeting tonight.

Submitted by: _____
Dr. James Flores, Secretary
Board of Trustees
Harbor Developmental Disabilities Foundation



FINANCIALS



Fu-Tien Chiou,
HDDE Treasurer

**HARBOR REGIONAL CENTER
MONTHLY FINANCIAL REPORT
FISCAL YEAR 2024-25
Jun-25**

	FY 2024-25 A-2	Month Exp	Y-T-D Expenses	Proj. Annual Expenses	Proj. Funds Available
Operations					
Salaries & Benefits	\$ 49,050,932	\$ 3,766,054	\$ 46,609,348	\$ 49,050,932	\$ -
Operating Expenses	12,246,456	424,049	9,913,766	12,246,456	-
less other income	(709,509)	(42,192)	(709,509)	(709,509)	-
Total Operations	<u>60,587,879</u>	<u>4,147,910</u>	<u>55,813,605</u>	<u>60,587,879</u>	<u>-</u>
Purchase of Service					
Regular*	474,238,217	37,407,743	412,805,786	442,415,131	31,823,086
Compliance with HCBS Regulations	675,401	-	7,018	675,401	-
less other income	(1,707,901)	(151,694)	(1,707,901)	(1,707,901)	-
Subtotal Regular	<u>473,205,717</u>	<u>37,256,049</u>	<u>411,104,903</u>	<u>441,382,631</u>	<u>31,823,086</u>
CPP/CRDP**	<u>650,000</u>	<u>18,921</u>	<u>26,976</u>	<u>325,000</u>	<u>325,000</u>
Total Purchase of Service	<u>473,855,717</u>	<u>37,274,969</u>	<u>411,131,879</u>	<u>441,707,631</u>	<u>32,148,086</u>
TOTAL	\$ 534,443,596	\$ 41,422,880	\$ 466,945,484	\$ 502,295,510	\$ 32,148,086
% of Budget	100.00%	7.75%	87.37%	93.98%	

* The Projected Annual Expenses for Regular POS is based on expenditures through June and projected late bills. The Projected Expenses increased by approximately \$12.4 million compared to the May financial report.

** Harbor was unable to contract with a service provider within the required timeframe for two (2) Community Resource Development Plan (CRDP) projects--a licensed day program and a family home agency. DDS will deallocate the funds in the A-3 contract amendment.

**HARBOR REGIONAL CENTER
FUNCTIONAL EXPENSE SUMMARY
Jun-25**

	FY 2024-25 A-2	Net Expended Month	Y-T-D	Projected Expenses	Proj. Annual Expenses	Proj. Funds Available
Purchase of Service:						
Residential care facilities	\$ 159,964,413	\$ 12,012,013	\$ 138,544,821	\$ 10,685,406	\$ 149,230,227	\$ 10,734,186
Day programs	99,280,132	7,271,459	87,287,194	5,330,885	92,618,079	6,662,053
Other purchased services	214,993,672	18,124,270	186,973,771	13,593,054	200,566,825	14,426,847
TOTAL PURCHASE OF SERVICE	474,913,618	37,407,743	412,812,804	30,277,728	443,090,532	31,823,086
Community Placement & Program Development:						
TOTAL CPP/CRDP	\$ 650,000	\$ 18,921	\$ 26,976	298,024	\$ 325,000	\$ 325,000
Salaries and Related Expenses:						
Salaries	38,417,511	3,335,549	36,355,496	2,062,015	38,417,511	-
Employee health and retirement benefits	10,633,421	430,505	10,253,852	379,570	10,633,421	-
Total Salaries and related expenses	49,050,932	3,766,054	46,609,348	2,441,584	49,050,932	-
Operating expenses:						
Facility Rent	6,185,068	-	6,083,822	101,246	6,185,068	-
Equipment and facility maintenance	735,243	108,181	701,661	33,582	735,243	-
Equipment purchases	930,050	81,415	366,006	564,044	930,050	-
General	2,150,898	87,494	866,320	1,284,578	2,150,898	-
Communication	985,953	27,844	887,517	98,436	985,953	-
Contract and consultant fee	137,719	82,771	104,983	32,736	137,719	-
General office expenses	408,432	16,431	296,806	111,626	408,432	-
Staff travel	114,028	13,239	87,799	26,229	114,028	-
Legal fees	117,292	4,613	70,730	46,562	117,292	-
Insurance	406,664	516	378,800	27,864	406,664	-
Accounting fees	63,000	-	63,000	-	63,000	-
Board expenses	12,109	1,544	6,323	5,786	12,109	-
Total Operating expenses	12,246,456	424,049	9,913,766	2,332,690	12,246,456	-
TOTAL OPERATIONS	61,297,388	4,190,103	56,523,114	4,774,274	61,297,388	-
TOTAL EXPENSES	\$ 536,861,006	\$ 41,616,766	\$ 469,362,894	\$ 35,350,026	\$ 504,712,920	\$ 32,148,086
Revenues:						
ICF SPA Income	\$ (1,707,901)	\$ (151,694)	\$ (1,707,901)	\$ -	\$ (1,707,901)	\$ -
Other income	(709,509)	(42,192)	(709,509)	-	(709,509)	-
TOTAL REVENUES	\$ (2,417,410)	\$ (193,886)	\$ (2,417,410)	\$ -	\$ (2,417,410)	\$ -
TOTAL	\$ 534,443,596	\$ 41,422,880	\$ 466,945,484	\$ 35,350,026	\$ 502,295,510	\$ 32,148,086

Month End Caseload
Month End Staff

20,068
468

**HARBOR REGIONAL CENTER
POS CONTRACT SUMMARY
Jun-25**

Fiscal Year	Contract	Fund	POS Budget	POS Claimed	Current Balance/ (Deficit)	Projected Expenses	Projected Balance/ (Deficit)
2024-25	A-2	Reg POS	\$ 472,530,316	\$ 373,890,469	\$ 98,639,847	\$ 66,816,760	\$ 31,823,086
		CPP/CRDP	650,000	8,055	641,945	316,945	325,000 *
		HCBS Compliance	675,401	7,018	668,383	668,383	-
		TOTAL	<u><u>\$ 473,855,717</u></u>	<u><u>\$ 373,905,543</u></u>	<u><u>\$ 99,950,174</u></u>	<u><u>\$ 67,802,088</u></u>	<u><u>\$ 32,148,086</u></u>
2023-24	E-4	Reg POS	\$ 376,553,743	\$ 345,930,978	\$ 30,622,765	\$ 2,631,184	\$ 27,991,581
		CPP/CRDP	1,100,000	139,488	139,488	960,512	-
		HCBS Compliance	633,401	45,000	45,000	588,401	-
		TOTAL	<u><u>\$ 378,287,144</u></u>	<u><u>\$ 346,115,466</u></u>	<u><u>\$ 345,166,435</u></u>	<u><u>\$ 4,180,097</u></u>	<u><u>\$ 27,991,581</u></u>
2022-23	D-4	Reg POS	\$ 367,557,895	\$ 300,579,368	\$ 66,978,527	\$ 1,274,605	\$ 65,703,922
		CPP/CRDP	2,756,276	2,211,082	545,194	107,500	437,694 **
		HCBS Compliance	622,672	348,300	274,372	(10,000)	284,372 ***
		TOTAL	<u><u>\$ 370,936,843</u></u>	<u><u>\$ 303,138,750</u></u>	<u><u>\$ 67,798,093</u></u>	<u><u>\$ 1,372,105</u></u>	<u><u>\$ 66,425,988</u></u>

* In the FY 2024-25 CRDP, Harbor was unable to contract with a service provider within the required timeframe for two (2) projects--a licensed day program and a family home agency. DDS will deallocate the funds in the A-3 contract amendment.

** Regarding FY 2022-23 CPP/CRDP, Harbor is working with DDS to move funds for four (4) projects from the second prior fiscal year to FY 2025-26. Additionally, one project was not completed and the corresponding \$125,000 allocation will revert back to DDS.

*** Regarding FY 2022-23 HCBS Compliance, two (2) projects were completed and the remaining funds will revert back to DDS.

HARBOR REGIONAL CENTER
LINE ITEM REPORT
Jun-25

		FY 2024-25 A-2	Net Expended Month	Y-T-D	Projected Expenses	Proj. Annual Expenses	Proj. Funds Available
PURCHASE OF SERVICE							
Regular							
320**	Out-of-Home	\$ 159,964,413	\$ 12,012,013	\$138,544,821	\$ 10,685,406	\$ 149,230,227	\$ 10,734,186
430**	Day Programs	99,280,132	7,271,459	87,287,194	5,330,885	92,618,079	6,662,053
6505*	Transportation	16,833,631	1,295,477	14,229,075	1,474,959	15,704,034	1,129,597
650**	Other Services	198,160,041	16,828,794	172,744,696	12,118,095	184,862,791	13,297,250
TBD	HCBS Compliance	675,401	-	7,018	668,383	675,401	-
	Subtotal Regular POS	474,913,618	37,407,743	412,812,804	30,277,728	443,090,532	31,823,086
Revenue							
20090	ICF SPA Income	(1,707,901)	(151,694)	(1,707,901)	-	(1,707,901)	-
TOTAL PURCHASE OF SERVICE		473,205,717	37,256,049	411,104,903	30,277,728	441,382,631	31,823,086
Community Placement & Program Development							
32010	Start Up	550,000	-	-	225,000	225,000	325,000
65***	Placement/Assessment	100,000	18,921	26,976	73,024	100,000	-
TOTAL CPP/CDRP		650,000	18,921	26,976	298,024	325,000	325,000
OPERATIONS							
Salaries & Benefits							
2501-	Salaries and Wages	38,417,511	3,335,549	36,355,496	2,062,015	38,417,511	-
2503-	Benefits	10,633,421	430,505	10,253,852	379,570	10,633,421	-
	Subtotal Salaries & Benefits	49,050,932	3,766,054	46,609,348	2,441,584	49,050,932	-
Operating Expenses							
30020	Equipment Maint	450,276	90,610	437,952	12,324	450,276	-
30030	Facility Rental	6,185,068	-	6,083,822	101,246	6,185,068	-
30040	Facility Maint	284,967	17,571	263,710	21,257	284,967	-
30050	Communication	985,953	27,844	887,517	98,436	985,953	-
30060	General Office Exp	190,281	13,338	140,116	50,165	190,281	-
30070	Printing	58,825	1,408	40,510	18,315	58,825	-
30080	Insurance	406,664	516	378,800	27,864	406,664	-
30090	Utilities	24,807	3,093	21,645	3,162	24,807	-
30110	Data Processing Maint	179,087	-	132,674	46,413	179,087	-
30123	Interest/Bank Expense	14,257	-	2,371	11,886	14,257	-
30140	Legal Fees	117,292	4,613	70,730	46,562	117,292	-
30150	Board of Dir. Exp	12,109	1,544	6,323	5,786	12,109	-
30160	Accounting Fees	63,000	-	63,000	-	63,000	-
30170	Equipment Purchases	930,050	81,415	366,006	564,044	930,050	-
30180	Contr/Consult Services	137,719	82,771	104,983	32,736	137,719	-
30184	Clinical Services	201,031	34,407	104,541	96,490	201,031	-
30185	Employee Conf. & Tuition Rein	24,701	-	21,606	3,095	24,701	-
30220	Travel in State	47,723	7,295	38,906	8,817	47,723	-
30223	Staff Mileage	66,305	5,945	48,893	17,412	66,305	-
30230	ARCA Dues	144,112	-	125,303	18,809	144,112	-
30240	General Expenses	1,182,576	23,169	472,723	709,853	1,182,576	-
TBD	LACC, DSMP	539,653	28,510	101,637	438,016	539,653	-
	Subtotal Operating Expenses	12,246,456	424,049	9,913,766	2,332,690	12,246,456	-
Other Revenue							
20040	Interest Income	(624,335)	(40,110)	(624,335)	-	(624,335)	-
20050	Other Income	(3,944)	-	(3,944)	-	(3,944)	-
20055	Other Income-Subleases	(55,744)	-	(55,744)	-	(55,744)	-
20100	ICF SPA Admin Fee	(25,486)	(2,082)	(25,486)	-	(25,486)	-
	Subtotal Other Revenue	(709,509)	(42,192)	(709,509)	-	(709,509)	-
TOTAL OPERATIONS		60,587,879	4,147,910	55,813,605	4,774,274	60,587,879	-
TOTAL		\$ 534,443,596	\$ 41,422,880	\$466,945,484	\$ 35,350,026	\$ 502,295,510	\$ 32,148,086
	% of Budget	100.00%	7.75%	87.37%	6.61%	93.98%	6.02%

Harbor Developmental Disabilities Foundation
Harbor Help Fund

Statement of Activities
Fiscal Year 2024-2025

		FY 2024-2025	
	FY 2023-24	4th Quarter	FY 2024-25
	TOTAL	Ending	YTD TOTAL
		06/30/2025	
<u>Income</u>			
Donations			
Employee Donations	\$ 11,728	3,091	12,365
In Kind Donations	2,000	-	-
General Donations	5,370	12,240	25,365
HRC 50th Anniversary Campaign			105,294
Holiday Donations	13,645	-	9,910
Total Donations	\$ 32,743	15,330	152,933
Interest & Other Income	4,994	1,260	2,744
Total Income	\$ 37,737	16,590	155,677
<u>Expenses</u>			
Holiday Giving - Gift Cards	40,600	200	26,500
Holiday Giving - Other	9,999	-	8,002
Other expense	39	-	638
\$50 for 50th Anniversary	-	3,636	3,636
Grants to Clients	7,400	1,350	3,150
Total Expenses	\$ 58,039	5,186	41,926
Net Increase/(Decrease)	\$ (20,302)	11,404	113,752
Beginning Balance	\$ 183,959	266,004	
Income	37,737	16,590	
Expenses	58,039	5,186	
Ending Balance	\$ 163,657	277,408	
Ending Balance Detail			
Cash	108,486	123,146	
50th Anniversary Fund	-	101,658	
CD	49,859	50,105	
Gift card inventory Visa	350	-	
Gift card inventory Other	1,300	-	
Loans Receivables	3,662	2,500	
Total Balance	\$ 163,657	277,408	



EXECUTIVE REPORT



Patrick Ruppe,
Harbor Executive Director
September 16, 2025



**CALIFORNIA
STATE BUDGET**
update





STRATEGIC PLAN PROGRESS *report*



**HARBOR REGIONAL CENTER
STRATEGIC PLAN PROGRESS REPORT
Fiscal Year 2024-25
Quarter 4: April 1 to June 30, 2025**

EXECUTIVE SUMMARY

The Harbor Regional Center (Harbor) Board of Trustees approved a Strategic Plan on March 21, 2023 that identifies the focus areas, goals and objectives Harbor is pursuing over fiscal years (FY) 2023-24 through 2025-26. Progress toward achieving the strategic goals and objectives is reported to, and evaluated by, the Board of Trustees on a quarterly basis. This represents the FY 2024-25 first quarterly progress report to the Board of Trustees. For purposes of this summary, progress is reported using the color coding defined in the key below. Details for each of the focus areas, goals and objectives are found in the full progress report.

In the fourth quarter of this fiscal year, which concludes Year 2 of the Strategic Plan, progress on nine (9) Strategic Plan goals and objectives are on track. Two (2) goals/objectives have made slower progress, but are still on track within a few months of target dates. This shows improvement in two areas marked in Quarter 3 as in progress and slow progress (i.e., Enhanced Service Coordination Goal 2, Objective 1; Increase Resource Development Goal 1, Objective 3). As a reminder, two goals in the resource development area were specific to FY 2023-24 and so, were not carried over to FY 2024-25. This is why the Resource Development area on page 4 reflects only Objectives 3 and 4.

The accompanying progress report details the activities, achievements and challenges of implementing the Strategic Plan from April 1 to June 30, 2025.

KEY

Green = Proceeding as expected or completed within one month of target date	On Track
Yellow = Work started within two to three months of target date	In Progress
Red = Work started 3+ months beyond target date or was intentionally delayed	Slow Progress

OVERALL PERFORMANCE

Progress on Goals/Objectives This Reporting Period	On Track	In Progress	Slow Progress	Total
	9	2	0	11

PROGRESS AT A GLANCE

Strategic Focus Area One: Improve Individual and Family Experience and Satisfaction

Goal 1: Increase availability of information and communications to be more responsive and accessible to individuals and families.		
Objective 1: Deliver high quality, responsive and accessible information to individuals and families through June 30, 2026.		
Year 2: Ongoing implementation of Information and Communication Plan and revisions made as needed.		In Progress
Objective 2: Increase the percentage of individuals and families reporting satisfaction with HRC's delivery of information, including its accessibility and responsiveness, by June 30, 2026.		
Year 2: Continue conducting and evaluating surveys to gather information from individuals and families about their satisfaction with Harbor's information sharing and communication; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.		On Track
Goal 2: Optimize individuals' and families' active engagement in the planning process to provide the best individualized services and supports.		
Objective 1: Build infrastructure for HRC to become a more person-centered organization through June 30, 2026.		
Year 2: Ongoing implementation of the Person-Centered Organization Plan and revisions made to plan as needed.		On Track
Objective 2: Increase the percentage of individuals and families reporting whose feedback indicates HRC's case management staff were skilled in developing their person-centered service plans, and agree their plans are person-centered and meet their needs, by June 30, 2026.		
Year 2: Continue conducting and evaluating surveys to gather information from individuals and families about Harbor's person-centered practices; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.		On Track

Strategic Focus Area Two: **Enhanced Service Coordination**

Goal 1: Maintain customer-focused culture.	
Objective 1: HRC staff will enhance and/or acquire new customer service skills through a formal customer service training program with a standard set of competencies through June 30, 2026.	
Year 2: Finish training staff; continue including as part of new staff onboarding; evaluate feedback on training and revise as needed.	On Track
Objective 2: Increase the percentage of individuals and families reporting satisfaction with HRC's customer service by June 30, 2026.	
Year 2: Continue conducting and evaluating surveys to gather information on the satisfaction of individuals and families with Harbor's customer service; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.	On Track
Goal 2: HRC will enhance its organizational knowledge and adopt new best practices as needed.	
Objective 1: Ensure ongoing learning opportunities for HRC staff to increase their knowledge, skills and abilities and enhance their job performance through June 30, 2026.	
Year 2: Continue developing and offering new training opportunities, monitor small work/discussion groups and modify topics and groups as desired by individual departments.	On Track
Objective 2: Build a Community of Practice (CoP) for supporting individuals with developmental disabilities and their families, and incorporate new learning into the organization as appropriate through June 30, 2026.	
Year 2: CoP meets as planned throughout the year to share and gain knowledge as per its identified mission and goals; identifies best practices that may impact Harbor's services and supports to its community.	On Track

Strategic Focus Area Three: **Resource Development**

Goal 1: Provide individuals and families with an array of innovative service delivery options that meet their cultural, linguistic and geographic needs.	
Objective 3: Develop targeted resources that increase service delivery options to meet cultural, linguistic and geographic needs through June 30, 2026.	
Year 2: Develop a total of eight (8) services to increase capacity based on relevant needs assessments, gap analyses, and in alignment with DDS' Regional Center Performance Measures. The services to be developed include specialized residential homes, supported living services, financial management services, and early intervention services.	On Track
Objective 4: Increase the percentage of individuals and families reporting satisfaction with the cultural diversity of HRC's service providers by June 30, 2026.	
Year 2: Continue conducting and evaluating surveys to gather information from individuals and families about their satisfaction with the cultural diversity of Harbor's service providers; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.	On Track

Strategic Focus Area Four: **Community Engagement**

Goal 1: Facilitate individual and family collaboration and partnership with HRC.	
Goal 2: Build trust with individuals, families, providers and the surrounding community.	
Goal 3: Develop and maintain meaningful partnerships and connections.	
Goal 4: Increase awareness of HRC's unique value.	
Goal 5: Advocate for flexible and sustainable personalized services and supports.	
Objective 1: Develop, implement and evaluate a comprehensive community engagement plan through June 30, 2026.	
Year 2: Ongoing implementation of the Community Engagement Plan and revisions made to plan as needed.	In Progress

HARBOR REGIONAL CENTER STRATEGIC PLAN PROGRESS REPORT

Fiscal Year 2024/25

Quarter 4: April 1 to June 30, 2025

DETAILED SUMMARY

STRATEGIC FOCUS AREA ONE

IMPROVE INDIVIDUAL AND FAMILY EXPERIENCE AND SATISFACTION

Goal 1: Increase availability of information and communications to be more responsive and accessible to individuals and families.				
Objective	Year 2 Activities	Current Period Activities	Progress for Current Period	Status*
Objective 1: Deliver high quality, responsive and accessible information to individuals and families through June 30, 2026.	Year 2: Ongoing implementation of three-year plan and revisions made as needed.	- Review and revise Harbor's policies and procedures to ensure person-centered language is included by June 30, 2025. - Incorporate person-centered language in Harbor communications (e.g., website, informational materials, public presentations, etc.) - Full implementation of Harbor's internal Information and Communicate Guide. - Develop a Brand Kit for Harbor's external partners.	- Progress in this area has been steady, but slower than anticipated. - Work on the Information and Communication Guide continues with finalization and implementation expected in the next fiscal year (i.e., Year 3 of the Strategic Plan). - Instead of a formal external Brand Kit, a logo use guide for Harbor's external partners was drafted this quarter and is under review by executive leadership.	In Progress
Objective 2: Increase the percentage of individuals and families reporting satisfaction with HRC's delivery of	Year 2: Continue conducting and evaluating surveys to gather information from individuals and families	- Distribute Year 2 annual survey. - Collect, summarize and analyze survey responses.	The annual survey was distributed on April 21, 2025 and closed May 23, 2025.	

information, including its accessibility and responsiveness, by June 30, 2026.	about their satisfaction with Harbor's information sharing and communication; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.	• Debrief on process and note changes needed for Year 3. • Present Year 2 survey findings.	• Survey results were collected, summarized and analyzed in June. • A debrief meeting was took place and notes were made for Year 3 implementation. • A presentation of Year 2 survey findings is scheduled for the September 16, 2025 Board of Trustees' Meeting	On Track
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Goal 2: Optimize individuals' and families' active engagement in the planning process to provide the best individualized services and supports.				
Objective	Year 2 Activities	Current Period Activities	Progress for Current Period	Status*
Objective 1: Build infrastructure for HRC to become a more person-centered organization through June 30, 2026.	Year 2: Ongoing implementation of three-year plan and revisions made to plan as needed.	• All case management staff and first line supervisors/ managers will complete person-centered service plan facilitation training. • Training incorporated into new employee orientation. • Begin offering PCT training designed specifically for individuals and families. • Continue offering PCT training to service providers. • Ongoing implementation of the three-year plan continues.	• All staff were trained in the new standardized IPP format before the January 2025 rollout and support was provided to case management staff this quarter as needed. • This training has been incorporated into new employee orientation. • PCT training for families has been added to the Saturday Speaker Series and is scheduled in July and August 2025. • Service providers are now being invited to join regularly scheduled PCT trainings.	On Track

			• Ten (10) workshops were held for staff related to building skills in PCT.	
Objective 2: Increase the percentage of individuals and families reporting whose feedback indicates HRC's case management staff were skilled in developing their person-centered service plans, and agree their plans are person-centered and meet their needs, by June 30, 2026.	Year 2: Continue conducting and evaluating surveys to gather information from individuals and families about Harbor's person-centered practices; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.	• Distribute Year 2 annual survey. • Collect, summarize and analyze survey responses. • Debrief on process and note changes needed for Year 3. • Present Year 2 survey findings. • Summarize and analyze the third quarter results for the person-centered service planning Survey that is provided to individuals and families immediately after their Individual Program Plan (IPP) meeting.	• The annual survey was distributed on April 21, 2025 and closed May 23, 2025. • Survey results were collected, summarized and analyzed in June. • A debrief meeting was took place and notes were made for Year 3 implementation. • A presentation of Year 2 survey findings is scheduled for the September 16, 2025 Board of Trustees' Meeting • Quarter 3 results from the survey provided to individuals and families immediately after their IPP were summarized, analyzed. Highlights included: - o 6% return (n=230) - o Results were positive with 89% to 94% strongly agreeing with statements.	On Track

***KEY**

Green – Proceeding as expected or completed within one month of target date	On Track
Yellow – Work started within two or three months of target date	In Progress
Red – Work started 3+ months beyond target date or was intentionally delayed	Slow Progress

FOCUS AREA ONE: SUMMARY AND NEXT STEPS

Communication and Information

Harbor continues to engage in many activities to ensure that information and communication is as effective as possible both internally and for our community. The development of all new materials (e.g., flyers, fact sheets, presentations) incorporates person-centered language and strives to be accessible and user-friendly.

Progress towards reviewing and revising Harbor's existing policies and procedures continues at a slower pace than originally anticipated and will continue into the next fiscal year. The Information and Communications Guide is under review and is expected to be finalized and implemented in the next fiscal year (i.e., Year 3 of the Strategic Plan). The guide consists of the purpose of the guide, key concepts, as well as guidelines for effective communication, brief overview on how to use the guide, and a mock-up of a reference sheet that will be used.

During this quarter, a logo use guide was developed to ensure that clear guidelines are in place about the use of Harbor's logo by our community partners. The goal is to implement an efficient process that maintains the integrity of Harbor's logo and mission when it is used by our community partners. The guide is under review and implemented is anticipated in the coming fiscal year (i.e., Year 3 of the Strategic Plan).

Person-Centered Organization

PCT trainings and person-centered service plan facilitation training continues to be offered and both are part of new employee orientation. As noted last quarter, Harbor provided training and ongoing support to case management staff for the January 2025 roll out the new standardized person-centered Individual Program Plan (IPP), as required by the Department of Developmental Services (DDS). Support for case management staff continued throughout this quarter to ensure proper implementation continues. Also, as part of building a person-centered infrastructure within Harbor, various PCT components are being embedded in our everyday work (e.g., one-page descriptions, Important to and Important for, and writing person centered outcomes). Ten (10) voluntary workshops were offered this quarter to help staff further develop their person-centered thinking skills. A PCT training for individuals and families did not occur this quarter, but is scheduled for July and August. Also beginning in July, Harbor's internal PCT trainings will be open to service providers.

Surveys

The FY 24/25 Individual and Family Experience and Satisfaction Survey was available from April 21st to May 23, 2025. Survey results have been summarized and analyzed. Overall, results were similar to last year's results, which were overall positive. A formal presentation of the results is scheduled for the September 16, 2025 Board of Trustees' Meeting. A debrief meeting was held in June to discuss the implementation process this year with notes made to further improve the process in the next fiscal year.

Harbor continues to implement a Person-Centered Service Planning Survey that is given to individuals and their circles of support immediately after their IPP meeting. During Quarter 3, 230 surveys were completed, which represents a 6%% return rate. Responses to the seven questions on the survey were positive with between 89% and 94% of survey respondents saying they strongly agreed with statements regarding the IPP meeting. Comments included many positive statements about service coordinators and how well they facilitated the process.

STRATEGIC FOCUS AREA TWO: ENHANCED SERVICE COORDINATION

Goal 1: Maintain customer-focused culture.				
Objective	Year 2 Activities	Current Period Activities	Progress for Current Period	Status*
Objective 1: HRC staff will enhance and/or acquire new customer service skills through a formal customer service training program with a standard set of competencies through June 30, 2026.	Year 2: Finish training staff; continue including as part of new staff onboarding; evaluate feedback on training and revise as needed.	• Ongoing implementation of customer service training as scheduled • Ongoing evaluation of feedback on training.	• A modified, shortened customer service training continues to be provided to new hires as part of their onboarding. • Additionally, Harbor's General Standards for Customer Service are included in new staff orientation. • Staff are asked to complete a survey immediately after the training to evaluate its effectiveness. To date, results have been positive.	On Track
Objective 2: Increase the percentage of individuals and families reporting satisfaction with HRC's customer service by June 30, 2026.	Year 2: Continue conducting and evaluating surveys to gather information on the satisfaction of individuals and families with Harbor's customer service; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.	• Distribute Year 2 annual survey. • Collect, summarize and analyze survey responses. • Debrief on process and note changes needed for Year 3. • Present Year 2 survey findings. • Summarize and analyze the third quarter results for the customer service survey that is always available to Harbor's community.	• The annual survey was distributed on April 21, 2025 and closed May 23, 2025. • Survey results were collected, summarized and analyzed in June. • A debrief meeting was took place and notes were made for Year 3 implementation. • A presentation of Year 2 survey findings is scheduled for the September 16, 2025	On Track

			Board of Trustees' Meeting • Quarter 3 results from the ongoing customer service survey were summarized, analyzed. Highlights included: - o 38 responses were received - o Results were positive with 93% to 97% components of the customer service they received as exceeding or meeting their expectations and 76% saying their overall experience with Harbor was "great".	
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Goal 2: HRC will enhance its organizational knowledge and adopt new best practices as needed.				
Objective	Year 2 Activities	Current Period Activities	Progress for Current Period	Status*
Objective 1: Ensure ongoing learning opportunities for HRC staff to increase their knowledge, skills and abilities and enhance their job performance through June 30, 2026.	Year 2: Continue developing and offering new training opportunities, monitor small work/discussion groups and modify topics and groups as desired by individual departments.	• Continue developing and offering new professional development opportunities. • Monitor success of offerings through June 30, 2025.	• A "Compassion at Work" series was offered to Harbor staff and service providers through April. • During Mental Health Awareness in May, a drop in event and seven (7) webinar rebroadcasts were offered to staff and other community members.	On Track

Goal 2: HRC will enhance its organizational knowledge and adopt new best practices as needed.				
Objective	Year 2 Activities	Current Period Activities	Progress for Current Period	Status*
			Ten (10) voluntary workshops were offered to help staff develop their person-centered skills.	
Objective 2: Build a Community of Practice (CoP) for supporting individuals with developmental disabilities and their families, and incorporate new learning into the organization as appropriate through June 30, 2026.	Year 2: CoP meets as planned throughout the year to share and gain knowledge as per its identified mission and goals; identifies best practices that may impact Harbor's services and supports to its community.	- Hold quarterly CoP Steering Committee meetings. - Hold monthly online Coaching Circles. - Ongoing implementation of CoP activities implemented and monitored.	- The CoP Steering Committee continues to meet monthly. - Two online coaching circles were held in April 2025 with a total of 48 participants. - A "Taking Action" online meeting took place in May 2025 with 12 participants. - The CoP held a "Deep Dive" in person meeting in June 2025 with 35 participants.	On Track

***KEY**

Green – Proceeding as expected or completed within one month of target date	On Track
Yellow – Work started within two or three months of target date	In Progress
Red – Work started 3+ months beyond target date or was intentionally delayed	Slow Progress

FOCUS AREA TWO: SUMMARY AND NEXT STEPS

Customer Service

Training

A modified, shortened customer service training called “Customer Service and Expectations” continues to be included in onboarding new staff. After completing the training, new hires are asked to complete a quick survey and results were very positive this quarter. Additionally, Harbor’s General Standards for Customer Service are infused into new employee orientation.

Surveys

The FY 24/25 Individual and Family Experience and Satisfaction Survey was available from April 21st to May 23, 2025. Survey results have been summarized and analyzed. Overall, results were similar to last year’s results, which were overall positive. A formal presentation of the results is scheduled for the September 16, 2025 Board of Trustees’ Meeting. A debrief meeting was held in June to discuss the implementation process this year with notes made to further improve the process in the next fiscal year.

Harbor continues to implement an ongoing Customer Service Survey that is available to anyone who interacts with Harbor staff. The survey is available on all Harbor staff email signature blocks, on Harbor’s website and a QR Code and hard copies of the survey are also available in all our reception areas and Family Resource Centers. During Quarter 3, 38 surveys were submitted. The results were positive with between 93% and 97% rating the customer service they received as exceeding or meeting their expectations and 76% saying their overall customer service experience with Harbor staff was “great”. It is important to note that this survey goes beyond the scope of the Strategic Plan in that anyone in our community can take the survey. That said, 71% of survey respondents were individuals and families served by Harbor.

Professional Development

Last quarter, this objective was marked as “slow progress” because the priority was on training and supporting case management staff on the new standardized IPP that was rolled out in January 2025. With the standardized IPP underway, more professional opportunities were offered. These included opportunities that were also offered to service providers and the general community. First, was a “Compassion at Work” series and second was a series of offerings for Mental Health Awareness Month. Additionally, ten (10) PCT workshops were offered this quarter with three focuses: (1) creating one-page descriptions (a PCT tool); (2) focusing on “Important to” and “Important for”, which are critical concepts in person-centered practices; and (3) writing person-centered outcomes. An email also went to staff this quarter asking who was interested in a Harbor Book Club. Several staff expressed interest so the details of the book club are being planned with a targeted start date of September 2025.

Community of Practice

Harbor's Community of Practice (CoP) has been very productive again this quarter. The focus of the CoP, which is the Home and Community Based Services (HCBS) Final Rule. Several types of meetings continue to be held on a quarterly basis. Deep Dive meetings are quarterly in person meetings that last 3 hours. Each Deep Dive focuses on 2 HCBS requirements and PCT skills that can help with those requirements. During these in person meetings, the community suggests topics for 5 Coaching Circles. Coaching Circles are 90 minutes each and happen across 2 days over Zoom. The topics covered in each coaching circles are determined based on what the community suggested during the Deep Dive and are led by a member of the community. These are meant to be smaller conversations. Taking Action meetings are also held once a quarter for 90 minutes over Zoom. These are refreshers on the HCBS requirement discussed at the deep dive and teach PCT skills that can be shared and taught to others. Finally, the CoP Steering Committee is a group of 17 members that meets remotely as needed to guide the direction of the general CoP. The Steering Committee is made up of individuals served, service providers, and Harbor staff. All CoP events are open to any members of the Harbor community including individuals served, their circles of support, service providers, and Harbor Staff. As noted above for this quarter, the CoP Steering Committee met monthly Coaching Circles were held in April. A Taking Action meeting occurred in May. A Deep Dive took place in June. During the Deep Dive meetings, Harbor's staff connected with a few providers who are interested in becoming more involved not only in the CoP, but also in the PCT training Harbor is doing. These community building relationships and opportunities will continue to be explored in the upcoming fiscal year.

STRATEGIC FOCUS AREA THREE: RESOURCE DEVELOPMENT

Goal 1: Provide individuals and families with an array of innovative service delivery options that meet their cultural, linguistic and geographic needs.				
Objective	Year 2 Activities	Current Period Activities	Progress for Current Period	Status*
Objective 3: Develop targeted resources that increase service delivery options to meet cultural, linguistic and geographic needs through June 30, 2026.	Year 2: Development of resources to be determined based on relevant needs assessments, gap analyses, and in alignment with DDS' Regional Center Performance Measures.	• Ongoing activities to develop eight (8) resources this fiscal year, including • specialized residential homes • supported living services • financial management services, and • early intervention services.	• Eleven (11) targeted resources targeted were developed this fiscal year. • An additional ten (10) resources were developed that align with the Strategic Plan, but were not specifically targeted in Year 2.	On Track
Objective 4: Increase the percentage of individuals and families reporting satisfaction with the cultural diversity of HRC's service providers by June 30, 2026.	Year 2: Continue conducting and evaluating surveys to gather information from individuals and families about their satisfaction with the cultural diversity of Harbor's service providers; identify areas of low satisfaction, set targets and identify strategies for improving low satisfaction, as appropriate.	• Distribute Year 2 annual survey. • Collect, summarize and analyze survey responses. • Debrief on process and note changes needed for Year 3. • Present Year 2 survey findings.	• The annual survey was distributed on April 21, 2025 and closed May 23, 2025. • Survey results were collected, summarized and analyzed in June. • A debrief meeting was took place and notes were made for Year 3 implementation. • A presentation of Year 2 survey findings is scheduled for the September 16, 2025 Board of Trustees' Meeting agreeing with statements.	On Track

***KEY**

Green – Proceeding as expected or completed within one month of target date	On Track
Yellow – Work started within two or three months of target date	In Progress
Red – Work started 3+ months beyond target date or was intentionally delayed	Slow Progress

FOCUS AREA THREE: SUMMARY AND NEXT STEPS

Develop New Resources

Last quarter, this objective was marked as “in progress” because progress was slower than anticipated. By the end of this quarter, progress improved and the goal of developing eight (8) targeted resources was achieved. This goal focuses on new development that expands the array of service option to meet the cultural, linguistic and geographic needs of our community. It does not include the development we do to increase service options or replace service options when existing providers close their businesses or retire.

During this fiscal year, eleven (11) resources were developed in the areas targeted:

- Expand FMS – Three (3) FMS providers were vendored to address geographic, linguistic, and cultural needs.
- Expand SLS – No SLS providers were vendored; however, one provider was selected through the RFP process and is going through the vendorization process. The service is expected to be available in the upcoming fiscal year.
- Expand specialized residential supports – One EBSH was vendored to address geographic needs.
- Expand early intervention services – Four (4) Speech and Language Pathologists were vendored to expand services geographically and linguistically. A provider for in-home service was also selected through the RFP process this fiscal year and is going through the vendorization process. The service is expected to be available in the upcoming fiscal year.

An additional ten (10) new resources were developed that align with the Strategic Plan, but are listed separately because they were not specifically targeted for development in the above areas. They include:

- Residential services (i.e., Level 6 homes) for geographic expansion (n=4)
- Independent living services (ILS) for geographic and linguistic expansion (n=3)
- Behavioral services for geographic expansion (n=2)
- Personal Assistance for geographic and linguistic expansion (n=1)

Surveys

The FY 24/25 Individual and Family Experience and Satisfaction Survey was available from April 21st to May 23, 2025. Survey results have been summarized and analyzed. Overall, results were similar to last year’s results, which were overall positive. A formal presentation of the results is scheduled for the September 16, 2025 Board of Trustees’ Meeting. A debrief meeting was held in June to discuss the implementation process this year with notes made to further improve the process in the next fiscal year.

STRATEGIC FOCUS AREA FOUR: COMMUNITY ENGAGEMENT

- Goal 1:** Facilitate individual and family collaboration and partnership with HRC.
- Goal 2:** Build trust with individuals, families, providers and the surrounding community.
- Goal 3:** Develop and maintain meaningful partnerships and connections.
- Goal 4:** Increase awareness of HRC's unique value.
- Goal 5:** Advocate for flexible and sustainable personalized services and supports.

Objective	Year 2 Activities	Current Period Activities	Progress for Current Period	Status*
Objective 1: Develop, implement and evaluate a comprehensive community engagement plan through June 30, 2026.	Year 2: Ongoing implementation of the Community Engagement Plan and revisions made to plan as needed.	• Develop scripts for Harbor staff to include at community events to ground everyone in Harbor's vision, mission and guiding values. • Create a system for tracking information about the individuals and families who attend community engagement events to use for developing strategies to increase participation. • Maintain a master list of existing community partners and establish priorities based on identified gaps. • Develop a process for identifying and tracking new community partners. • Create a legislative advocacy toolkit for individuals, families and service providers. • Ongoing "meet and greets" and other	• Progress in this area has been steady, but slower than anticipated. • Scripts for Harbor staff to use at community events were drafted this quarter, and are being piloted within the Information and Development Dept before being rolled out agency wide. • Tracking information for attendees at community events has been a challenge so a system has not yet been put in place. • A master list for existing and new community partners was developed. • The master list continues to evolve as the executive leadership team analyzes it, identifies gaps and tracks existing and new partnerships at least quarterly. This work will	In Progress

		engagement activities with local legislators.	continue in the next fiscal year (i.e., Year 3 of the Strategic Plan). • Internal guidelines for contacting local legislators were finalized this quarter. • A legislative advocacy 101 training was developed and is under review for finalization. • Many community engagement activities, including those with state and local legislators continued this quarter.	
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***KEY**

Green – Proceeding as expected or completed within one month of target date	On Track
Yellow – Work started within two or three months of target date	In Progress
Red – Work started 3+ months beyond target date or was intentionally delayed	Slow Progress

FOCUS AREA FOUR: SUMMARY AND NEXT STEPS

As this fiscal year, and Year 2 of the Strategic Plan came to an end, we noted that some activities are taking more time to implement than originally anticipated. Nevertheless, Harbor’s overall community engagement efforts continue to be a priority and our efforts to establish new and maintain existing partnerships within our community continue to be strong.

This quarter, more than 100 trainings, workshops and other community events were held for individuals and families across all departments of Harbor. This includes the new support group “Peer Hangout”, which met three (3) times. It also includes five (5) focus groups in Korean, Tagalog, Spanish, Khmer/Cambodian and Chinese/Mandarin, one (1) listening session and six (6) parent mentor clinics in Norwalk and Long Beach.

Among other outreach events this quarter, Harbor hosted a transition event at ICAN California Abilities Network, an African American Mental Health and Disability Awareness Workshop and a grand opening of our new building. Additionally, many events engaged community partners including school districts, colleges, local cities and local governmental departments with a shared commitment to the individuals and families we serve.

Specifically related to our child-find efforts and outreach to our community to ensure potentially eligible individuals find us, several activities occurred this quarter. In June, Harbor participated in Developmental Day in collaboration with the African American Family Mental Health and Disability Awareness Project. Harbor also conducted nine presentations in the community this quarter and developed a relationship with Kindred Hospital Paramount.

This was a busy quarter regarding legislative advocacy. We finalized a template to use for Calls for Actions, as part of Harbor's e-newsletter, which will be used when there are opportunities for community involvement or public notice for important legislative activities. The template has already been used regarding potential Medicaid cuts. A Legislative Advocacy 101 training was developed this quarter and the plan is to offer this training twice in the next fiscal year. Finally, on June 24, 2025, Harbor invited elected officials to the grand opening of our new building. Representatives from Supervisor Janice Hahn, Assembly Member Mike Gipson, Assembly Member Josh Lowenthal, Senator Ben Allen, and Senator Laura Richardson attended. Four of these offices presented Harbor with Certificates of Recognition.

The areas where slower progress has been made is in tracking participation in our community events and with finalizing an efficient and effective agencywide way to track our new and existing community partners. Many of our staff are involved in community engagement and the executive leadership team continues to fine tune the master list that's been developed. Tracking participants at community events continues to be difficult as some individuals and families are nervous to write their names on sign-in sheets. We continue to brainstorm ways not only to track who attends events, but also to encourage and support more people to attend them.



HARBOR

REGIONAL CENTER

Strategic Plan Period:
July 1, 2023 to June 30, 2026

PROGRESS REPORT

Fiscal Year 2024-25

Strategic
Plan



STRATEGIC PLAN ANNUAL PROGRESS REPORT

♦ Fiscal Year 2024-25

Executive Summary

The 2023-2026 Harbor Regional Center Strategic Plan is designed so that progress can be measured on a regular basis. This allows for timely adjustments, promotes a culture of accountability and provides clear, data driven snapshots of our progress.

This second annual report provides an assessment of each goal and objective in the Strategic Plan. It highlights noteworthy achievements and at the same time, acknowledges the areas where progress has been slower in meeting some strategic goals. For detailed updates on each area, please refer to the FY 2024-25 Quarterly Strategic Plan Progress Reports. Please note that two goals in the resource development area were specific to FY 2023-24 and were not carried over to FY 2024-25. This is why the Resource Development section reflects only Objectives 3 and 4.

Progress is reported using a green-yellow-red scheme. For purposes of this summary, the color designations are defined as follows:

On Track

Green - On Track (proceeding as expected or completed within one month of targeted date)

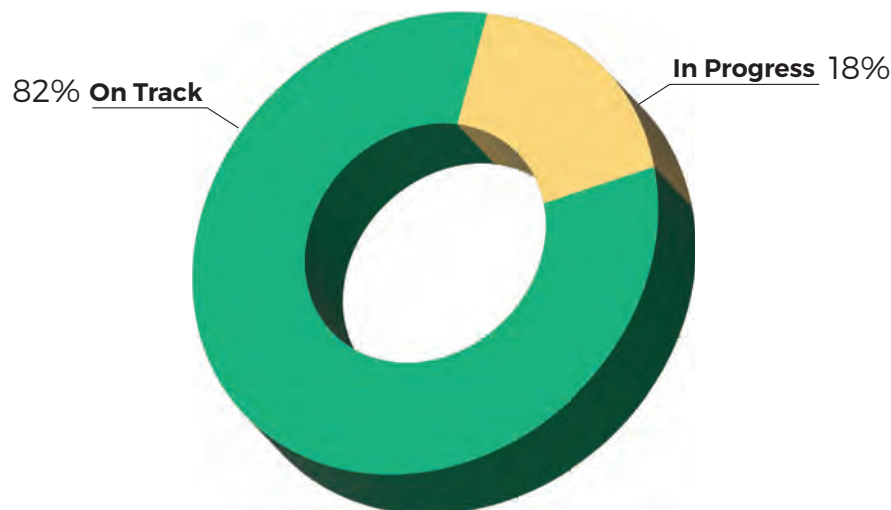
In Progress

Yellow - In Progress (work started within two or three months of targeted date)

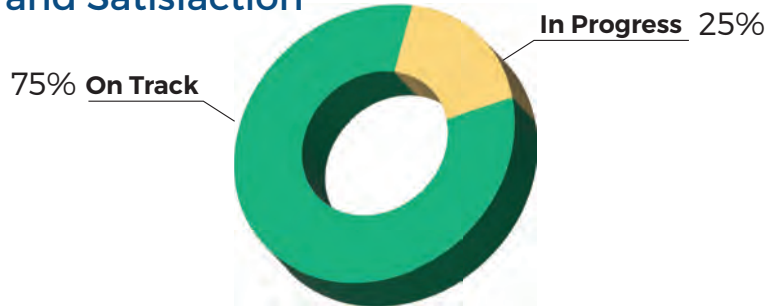
Slow Progress

Red - Slow Progress (3+ months beyond targeted date or intentionally delayed)

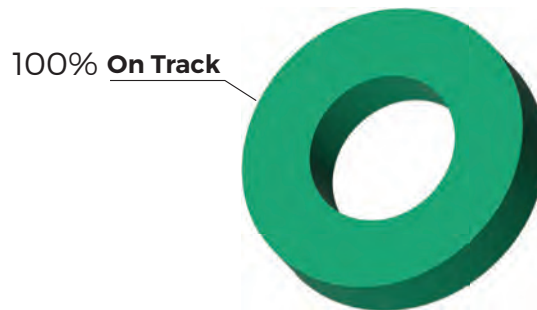
Progress on all goals and objectives combined



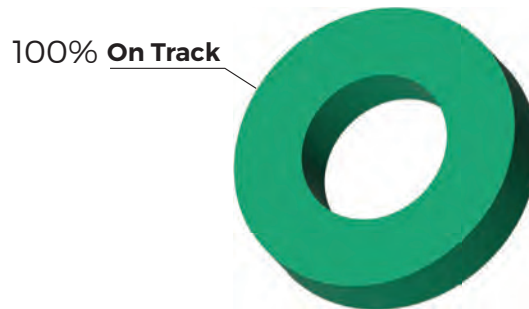
Progress on Focus Area 1 – Improve Individual and Family Experience and Satisfaction



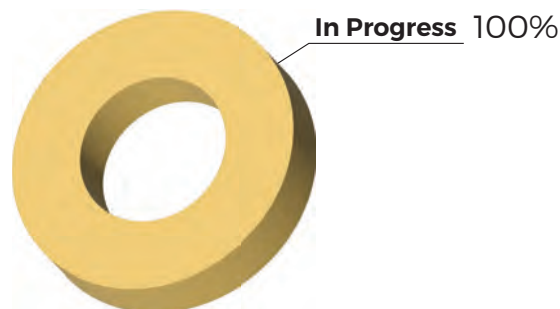
Progress on Focus Area 2 – Enhance Service Coordination



Progress on Focus Area 3 – Increase Resource Development



Progress on Focus Area 4 – Strengthen Community Engagement



STRATEGIC PLAN ANNUAL PROGRESS AT A GLANCE

Focus Area 1: Improve Individual and Family Experience and Satisfaction

Goal 1: Increase availability of information and communications to be more responsive and accessible to all individuals and families.

Objective 1: Deliver high quality, responsive and accessible information to individuals and families through June 30, 2026.

Year 2: Ongoing implementation of three-year plan and revisions made as needed.

In Progress

Objective 2: Increase the percentage of individuals and families reporting satisfaction with Harbor's delivery of information, including its accessibility and responsiveness, by June 30, 2026.

Year 2: Continue to conduct survey, evaluate results, identify areas of low satisfaction and set targets for improvement.

On Track

Goal 2: Optimize individuals' and families' active engagement in the planning process to provide the best individualized services and supports.

Objective 1: Build infrastructure for Harbor to become a more person-centered organization through June 30, 2026.

Year 2: Ongoing implementation of three-year plan and revisions made as needed.

On Track

Objective 2: Increase the percentage of individuals and families whose feedback indicates Harbor's case management staff are skilled in developing their person-centered plan and agree their plans are person-centered and meet their needs, by June 30, 2026.

Year 2: Continue to conduct annual survey, evaluate results, identify areas of low satisfaction and set targets for improvement.

On Track

Focus Area 2: Enhance Service Coordination

Goal 2: Maintain customer-focused culture.

Objective 1: Harbor staff will enhance and/or acquire new customer service skills through a formal customer service training program with a standard set of competencies through June 30, 2026.

Year 2: Finish training staff; continue including as part of new staff onboarding; evaluate feedback on training and revise as needed.

On Track

Objective 2: Increase the percentage of individuals and families reporting satisfaction with Harbor's customer service by June 30, 2026.

Year 2: Ongoing implementation and evaluation of ongoing customer service survey; continue to conduct annual survey, evaluate results, identify areas of low satisfaction and set targets for improvement.

On Track

Goal 2: Harbor will enhance its organizational knowledge and adopt new best practices as needed.

Objective 1: Ensure ongoing learning opportunities for Harbor staff to increase their knowledge, skills and abilities and enhance their job performance through June 30, 2026.

Year 2: Continue to develop and offer new training opportunities, monitor small work/discussion groups, and modify topics and groups as desired.

On Track

Objective 2: Build a Community of Practice (CoP) for supporting individuals with developmental disabilities and their families, and incorporate new learning into the organization as appropriate through June 30, 2026.

Year 2: CoP to meet throughout the year to share and gain knowledge per its identified mission and goals; identify best practices that may impact Harbor's services and supports within its community.

On Track

Focus Area 3: Increase Resource Development

Goal 1: Provide individuals and families with an array of innovative delivery options that meet their cultural, linguistic and geographic needs.

Objective 3: Develop targeted resources that increase service delivery options to meet cultural, linguistic and geographic needs through June 30, 2026.

Year 2: Develop a total of eight new services to increase capacity.

On Track

Objective 4: Increase the percentage of individuals and families reporting satisfaction with the cultural diversity of Harbor's service providers by June 30, 2026.

Year 2: Continue to conduct survey, evaluate results, identify areas of low satisfaction and set targets for improvement.

On Track

Focus Area 4: Strengthen Community Engagement

Goal 1: Facilitate individual and family collaboration and partnership with Harbor.

Goal 2: Build trust with individuals, families, providers and the surrounding community.

Goal 3: Develop and maintain meaningful partnerships and connections.

Goal 4: Increase awareness of Harbor's unique value.

Goal 5: Advocate for flexible and sustainable personalized services and supports.

Objective 1: Develop, implement and evaluate a comprehensive community engagement plan through June 30, 2026.

Year 2: Continue to implement the community engagement plan, evaluate its success and revise as needed.

In Progress

PLANS FOR FISCAL YEAR 2025-26

Overview

Focus Area: Improve Individual and Family Experience and Satisfaction

- Ongoing implementation of the three-year Information and Communication Plan and three-year Person-Centered Organization Plan.
- Ongoing review of FY 2024-25 Individual and Family Experience and Satisfaction Survey results and implementation of strategies for improvement as applicable.
- Distribution of FY 2025-26 Individual and Family Experience and Satisfaction Survey with anticipated distribution in April/May 2026.

Focus Area: Enhance Service Coordination

- Continue including customer service training in onboarding curriculum for all new staff. Start to conduct biennial refresher trainings with all staff. Evaluate training and revise as needed.
- Distribution of FY 2025-26 Individual and Family Experience and Satisfaction Survey with anticipated distribution in April/May 2026.
- Ongoing professional development training opportunities offered to staff. Conduct biennial survey with staff about other possible professional development topics of interest.
- Ongoing Community of Practice meetings and identification of best practices, especially related to person-centered practices and Home and Community-Based Waiver Final Rule implementation. Promote the spread of best practices internally and within the community. Review mission and goals of CoP and revise as needed.

Focus Area: Increase Resource Development

- Ongoing development of targeted services that meet the cultural, linguistic and geographic needs of the individuals and families served by Harbor.
- Distribution of FY 2025-26 Individual and Family Experience and Satisfaction Survey anticipated distribution in April/May 2026.

Focus Area: Strengthen Community Engagement

- Ongoing implementation of the three-year Community Engagement Plan including, but not limited to, the development of new community partners, maintenance of existing community partners, and engagement in legislative advocacy. Evaluate the success of the multi-component plan and revise as needed.



HARBOR

REGIONAL CENTER



September 2025
www.harborrc.org



FOR BOARD APPROVAL
STRATEGIC PLANNING
review



Vision

Current

Harbor Regional Center envisions a world where people with developmental disabilities...

...live, learn, work, play and have meaningful relationships in their communities.

...are respected and empowered with early, consistent, culturally sensitive, and personalized services and supports.

...are informed knowledgeable partners, along with their circles of support, with Harbor Regional Center, and take joint responsibility in advocating for a thriving service delivery system.

...and their circles of support have the information, resources and assistance needed to help reach their highest potential at all stages of life.

Recommended Revision

Harbor Regional Center envisions a world where everyone with a developmental disability has meaningful relationships, is respected and empowered, is informed and knowledgeable, and reaches their highest potential throughout their life.

Mission

Current

Harbor Regional Center provides innovative and person-centered services, support, and information that empower people with developmental disabilities and their circles of support to live their best lives in their culturally diverse communities.

Recommended Revision

Harbor Regional Center empowers everyone with developmental disabilities, and the people who support them, by providing innovative and person-centered services that help them live their best lives in our diverse community.

Guiding Values

Current

Person Centered Philosophy

- We recognize everyone's unique strengths, gifts, talents, skills and contributions.
- We treat everyone with dignity and respect.
- We support the individuals we serve, and their circles of support, in having opportunities to make informed decisions and to have self-direction of their own lives.

Diversity, Equity & Inclusion

- We believe everyone should be seen, heard, valued and empowered to succeed.
- We promote a culture of inclusion and belonging that strengthens open, honest, and meaningful relationships.
- We listen and engage without judgment and collaborate effectively with people of diverse backgrounds and cultures.
- We embrace differing perspectives to make better decisions.

Partnership

- We believe success is best achieved by collaborating and growing with our partners; including the people we serve, their circles of support, our staff, our service providers, community leaders, local and state legislators and others who share our commitment to the vision of the Lanterman Act.

Innovation

- We dare to challenge the status quo and try new things.
- We learn from our past, we stay current, we advance our future.
- We focus on outcomes to ensure the people we serve live their best lives.

Accountability & Transparency

- We are dedicated to listening and receiving feedback from our community.
- We provide timely, accurate and comprehensive information to our community.
- We value fiscal responsibility and the effective use of resources.

Recommended Revision

Person Centered Philosophy – We recognize and respect each person's unique strengths and contributions, and support informed decision-making and self-direction.

Diversity, Equity, & Inclusion – We promote a culture of inclusion and belonging that strengthens meaningful relationships and embraces differing perspectives that guide our decision-making.

Partnership – We collaborate and grow with our partners; including those we serve, the people who support them, our staff, our service providers, community leaders, elected officials, and others who share our commitment to the vision of the Lanterman Act.

Innovation – We evolve by seeking better ways to advance our future.

Accountability & Transparency – We are fiscally responsible and use resources effectively, share timely and accurate information, and actively listen to our community.



**FOR BOARD APPROVAL
HARBOR HOLIDAY
HELP FUND**





Hearts for the Holidays 2025

Help us spread joy to individuals with
developmental disabilities this holiday
season!



Start the season
right, donate toys
and other goods to
share the warmth of
the holidays!

Contact Us Today!
resource.center@harborrc.org



HARBOR EVENTS





HARBOR
REGIONAL CENTER

YOU ARE INVITED TO CELEBRATE WITH US

DIA DE LOS MUERTOS

**OCTOBER 17, 2025
4PM - 7PM**

**NORWALK CULTURAL ARTS CENTER
13200 CLARKDALE AVE
NORWALK, CA 90650**

All Individuals/Families Served Are Welcome!

Live Music!

Free Food!

**Come meet Harbor
staff and have your
questions answered!**

**RSVP Encouraged:
HarborCulturalCelebra
tion.eventbrite.com**

**Questions?
(310) 543-0152**



DDS Department of
Developmental
Services

***This event is sponsored by Language Access and Cultural Competency Funds**

**DDS Bridges Newsletter: Harbor Regional
Center's Annual Backpack Giveaway was
a huge hit!**



ARCA ACADEMY

NOVEMBER 2025





Save the Date

ARCA Academy

November 14-15, 2025

@ Alta California Regional Center

This is a leadership development opportunity for the board members and the leadership staff of the California regional centers.

Watch for...Hotel Information, event Schedule, promotional videos, and other materials, etc.

Mark your calendar, you won't want to miss this one.

For questions, please contact Tony Anderson at tanderson@arcenet.org.



PRESENTATION

On

‘National Core Indicators (NCI) & Other Harbor Regional Center Surveys’

By

Thao Mailloux, Director of
Strategic Communications &
Engagement



National Core Indicators (NCI) & Other Harbor Regional Center Surveys Indicadores Básicos Nacionales & Otras Encuestas del Centro Regional Harbor

Presented by: Thao Mailloux, Director of Strategic Communications & Engagement

Presentado por: Thao Mailloux, Directora de Comunicaciones Estratégicas y Participación



National Core Indicators (NCI) Indicadores Básicos Nacionales (NCI)

Adult In-Person Survey 2022-2023

Encuesta en persona para adultos 2022-2023

National Core Indicators (NCI) Indicadores Básicos Nacionales

- The National Core Indicators (NCI) is a tool that has been used by public developmental disabilities agencies to measure and track effectiveness of services as reported by individuals served.
- The core indicators are standard measures used across states for those served to assess quality of services provided.
- The Department of Developmental Services (DDS) contracts with the State Council on Developmental Disabilities (SCDD) to conduct annual surveys on these measures.

- Los Indicadores Básicos Nacionales son una herramienta que ha sido utilizada por las agencias públicas de discapacidades del desarrollo para medir y hacer un seguimiento de la eficacia de los servicios según lo informado por las personas atendidas.
- Los indicadores básicos son medidas estándar utilizadas en todos los estados para que las personas atendidas evalúen la calidad de los servicios prestados.
- El Departamento de Servicios del Desarrollo (DDS) contrata al Consejo Estatal de Discapacidades del Desarrollo (SCDD) para realizar encuestas anuales sobre estas medidas.

NCI Surveys are completed every year. Las encuestas de NCI se realizan cada año.

The different types of surveys or data collection are rotated every two years.

Los diferentes tipos de encuestas o de recolección de datos rotan cada dos años.





Harbor Regional Center Website

Sitio web del Centro Regional Harbor

<https://www.harborrc.org/who-we-are/transparency-accountability/reporting/national-core-indicators/>

Department of Developmental Services Website

Sitio web del departamento de servicios de desarrollo

<https://www.dds.ca.gov/rc/nci/>

Survey Results & Reports

Resultados de la encuesta e informes

Adult In-Person Survey 2022-2023

Encuesta en persona para adultos 2022-2023

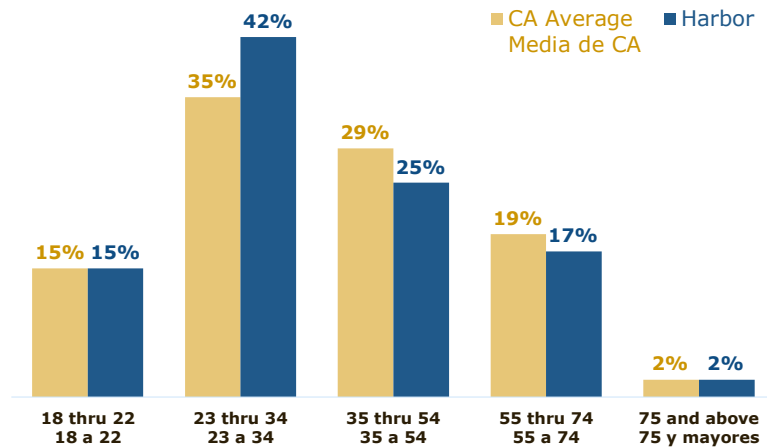


In California, 8,827 total surveys were conducted with an individual who is 18 years or older and receive at least one service beyond case management from a regional center. SCDD just finished surveys for 2024-2025.

En *California*, se realizaron 8,827 encuestas en total a personas mayores de 18 años que reciben al menos un servicio más allá de la coordinación de casos de un Centro Regional. El SCDD acaba de terminar las encuestas para 2024-2025.

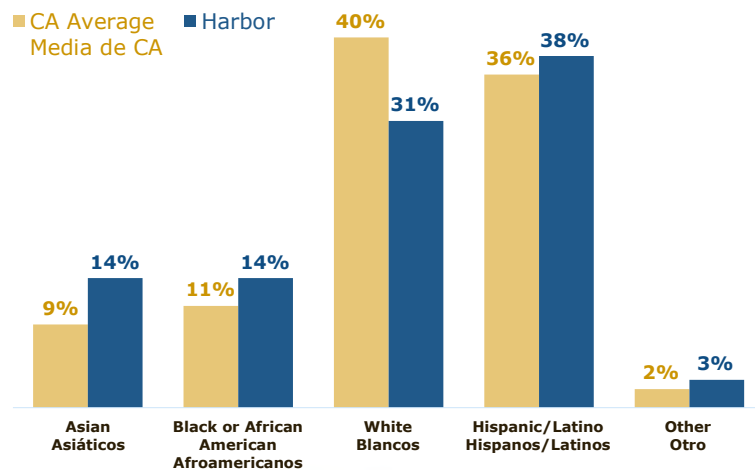
RESPONDENT DEMOGRAPHICS DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Age
Edad



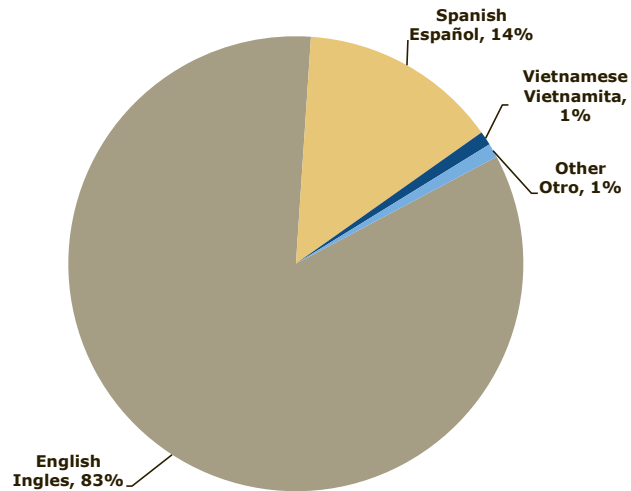
RESPONDENT DEMOGRAPHICS DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Ethnicity
Etnia



RESPONDENT DEMOGRAPHICS DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Preferred Language Idioma preferido



Domains Dominios

❖ Individual Outcomes
Resultados individuales

❖ Health, Welfare, & Rights
Salud, Bienestar y Derechos

❖ Employment
Empleo

❖ Relationships
Relaciones

❖ Satisfaction
Satisfacción

❖ Service Coordination
Coordinación de servicios

❖ Workforce
fuerza laboral

❖ Safety
Seguridad

❖ Health
Salud

❖ Respect/Rights
Respeto/Derechos

❖ Community Inclusion & Belonging
Inclusión y pertenencia a la comunidad

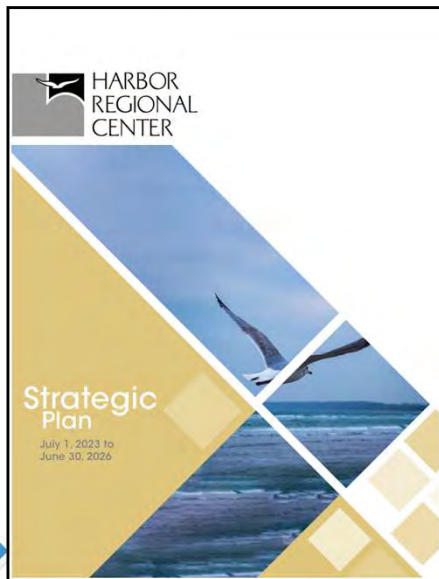
❖ Choice & Decision Making
Elección Y Toma De Decisiones

❖ Community Participation
Participación en la comunidad

❖ Access
Acceso

❖ Medications
Medicamentos

❖ Wellness
Bienestar



Strategic Plan Plan estratégico

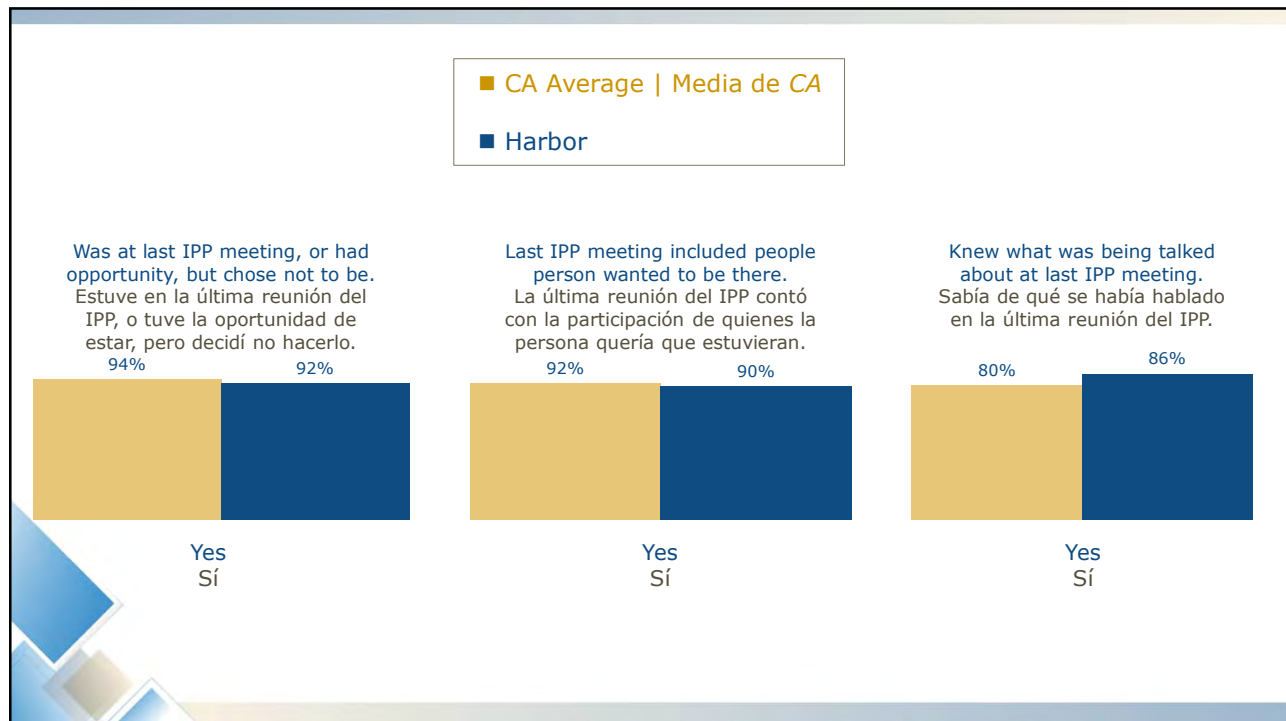
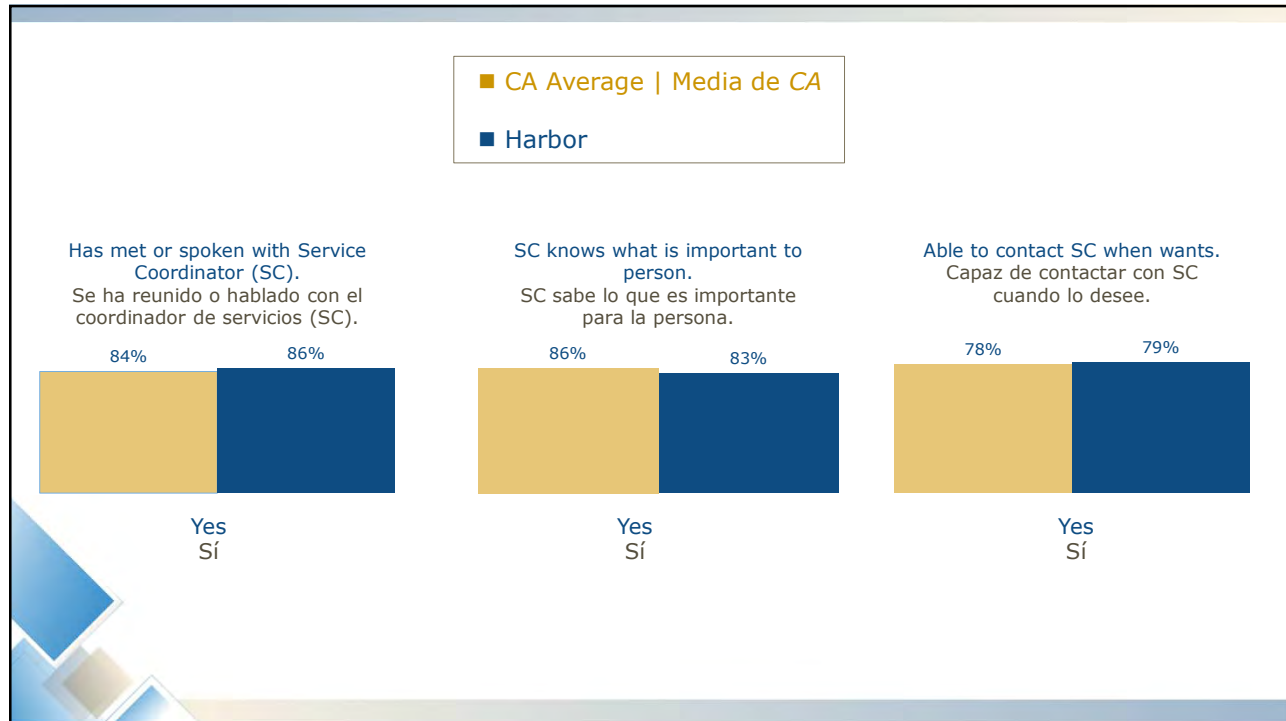
July 1, 2023 to June 30, 2026
Del 01/JUL/2023 al 30/JUN/2026

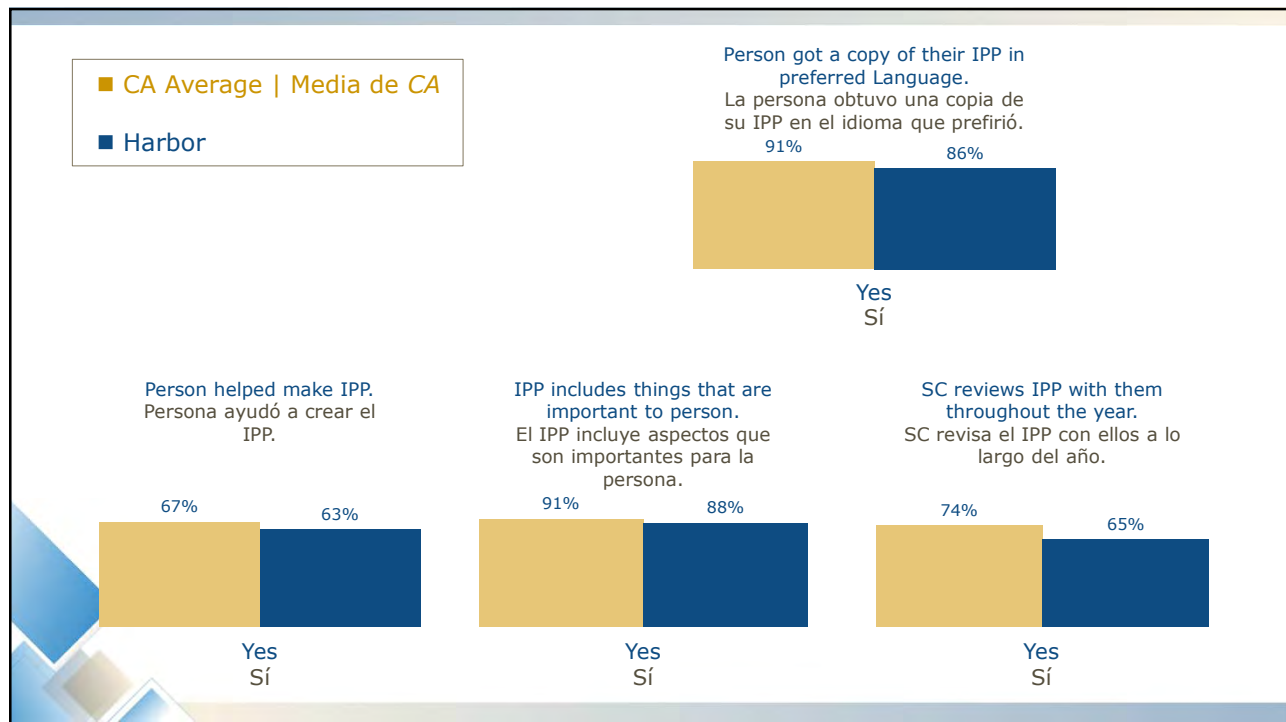
Focus Areas | Áreas de enfoque

- ❖ **Improve Individual & Family Experience and Satisfaction**
Mejorar la experiencia y la satisfacción de las personas y las familias
- ❖ **Enhance Service Coordination**
Optimizar la coordinación de servicios
- ❖ **Increase Resource Development**
Aumentar el desarrollo de recursos
- ❖ **Strengthen Community Engagement**
Reforzar el compromiso comunitario

Service Coordination Coordinación de servicios







Workforce Fuerza laboral



Staff treat the person with respect.
El personal trata a la persona con respeto.

95%
Yes|Si

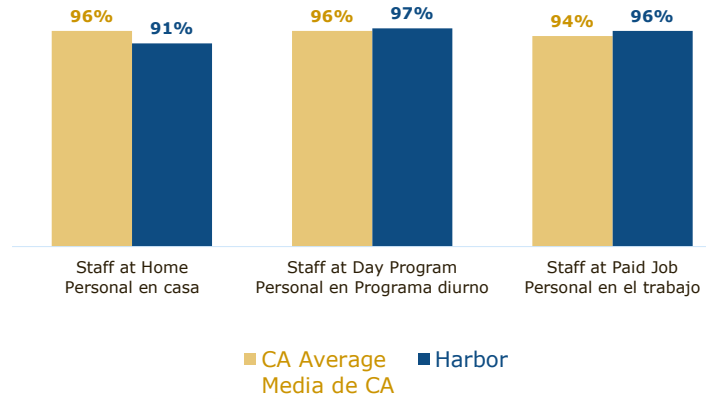
CA Average | Media de CA: 96%

Staff are respectful of person's culture.
El personal respeta la cultura de las personas.

95%
Yes|Si

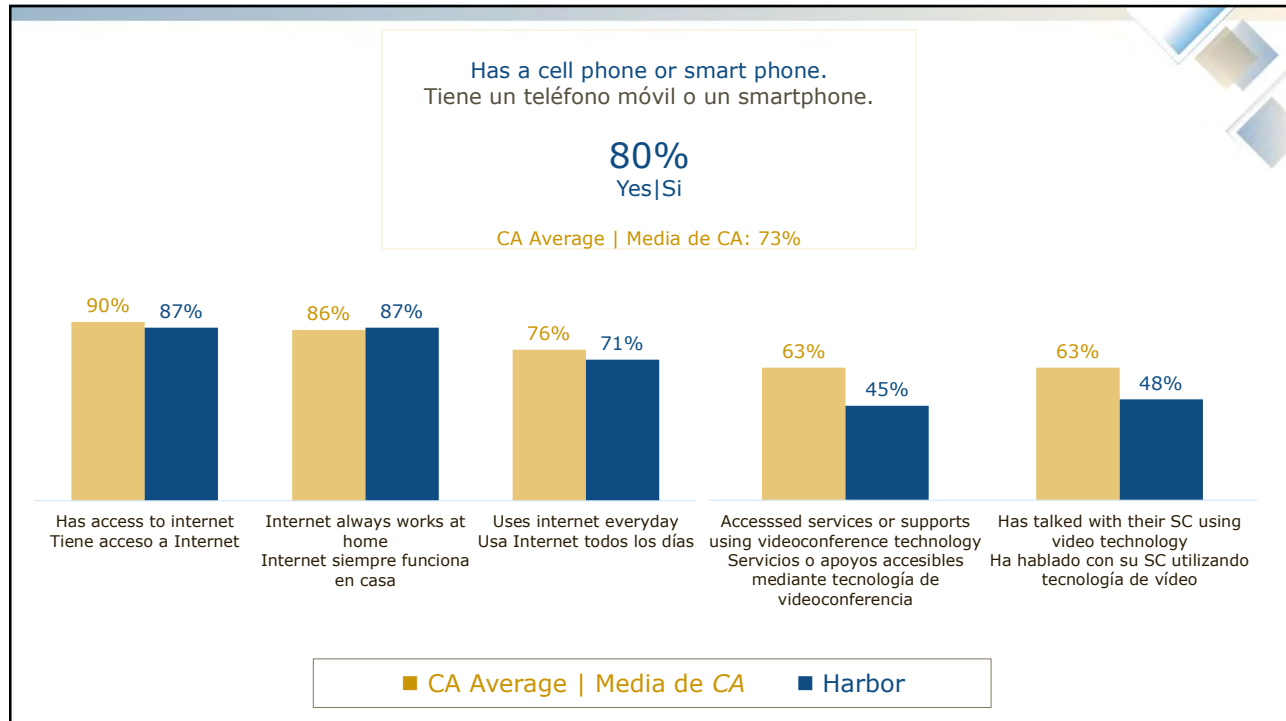
CA Average | Media de CA: 96%

Person can talk with staff in their preferred language.
Las personas pueden hablar con el personal en su idioma preferido.



Access to Information & Communications Acceso a la información y las comunicaciones

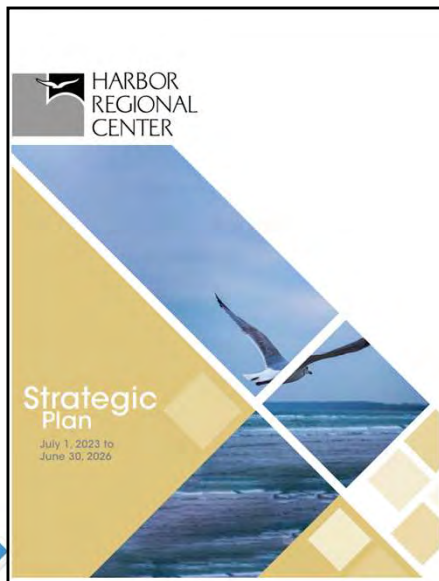




Best way to receive information from regional center La mejor manera de recibir información del centro regional	CA Average Media de CA	Harbor
Phone call (landline) Telefónica (línea fija)	20%	27%
Phone call (cell) Telefónica (móvil)	50%	49%
Text Texto	34%	17%
Email Correo electrónico	53%	30%
Website Sitio web	2%	1%
Social Media Redes sociales	0%	0%
Direct Mail Correo directo	45%	42%

Harbor's Annual Individual & Family Experience & Satisfaction Survey Results for Fiscal Year 2024-2025 Conducted April/May 2025

Encuesta Sobre la Experiencia y
Satisfacción de Personas y
Familias Durante el Ejercicio
Fiscal 2024-2025
Realizado en abril/mayo de 2025



Strategic Plan Plan estratégico

July 1, 2023 to June 30, 2026
Del 01/JUL/2023 al 30/JUN/2026

Focus Areas addressed in Annual Survey
Áreas de enfoque abordadas en la encuesta anual

- ❖ **Improve Individual & Family Experience and Satisfaction**
Mejorar la experiencia y satisfacción de personas y familias
- ❖ **Enhance Service Coordination**
Optimizar la coordinación de servicios
- ❖ **Increase Resource Development**
Aumentar el desarrollo de recursos

Respondent Demographics

Datos Demográficos de los Encuestados



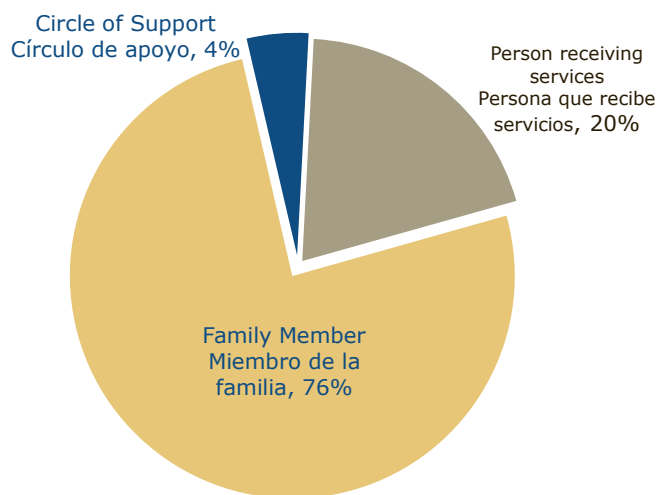
Received 912 survey responses
6% return

Se recibieron 912 respuestas a
la encuesta
Rendimiento del 6 %

RESPONDENT DEMOGRAPHICS

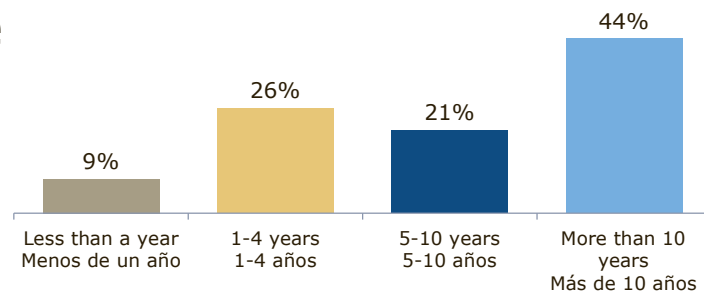
DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Relationship Relación



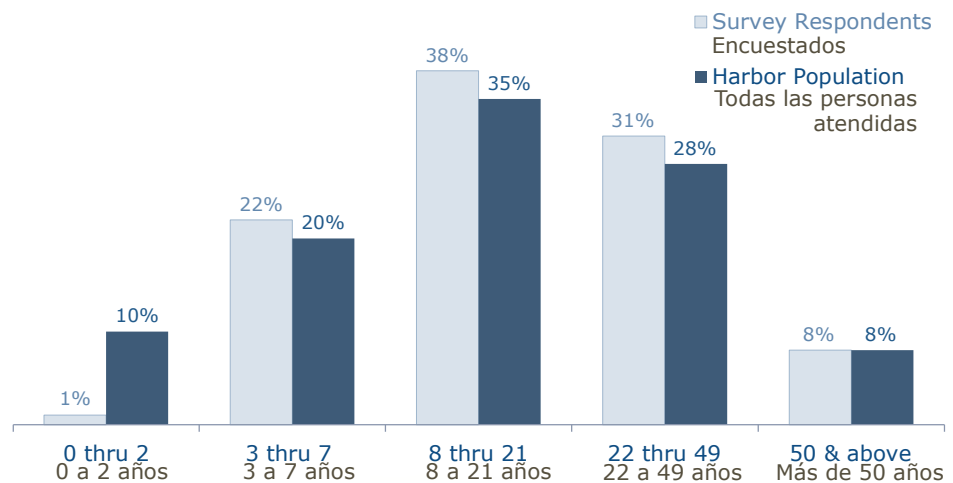
RESPONDENT DEMOGRAPHICS DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Years Served by Harbor Años de servicio de Harbor



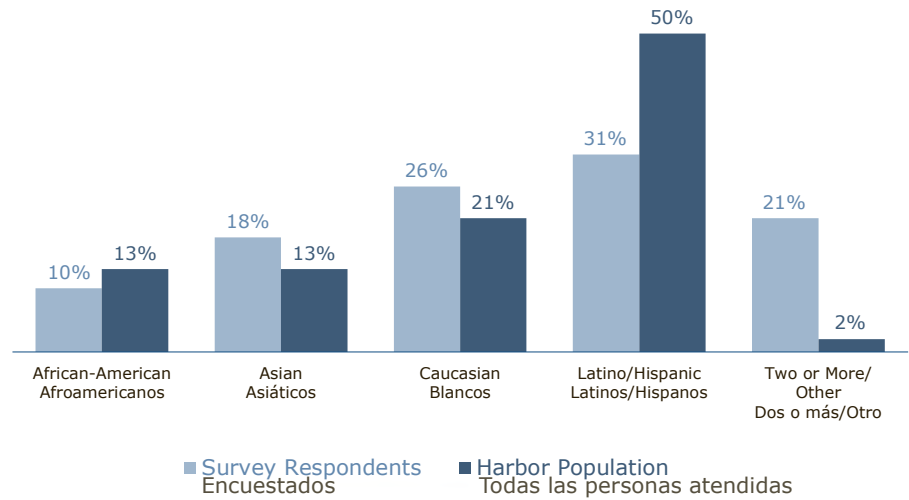
RESPONDENT DEMOGRAPHICS DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Age Edad



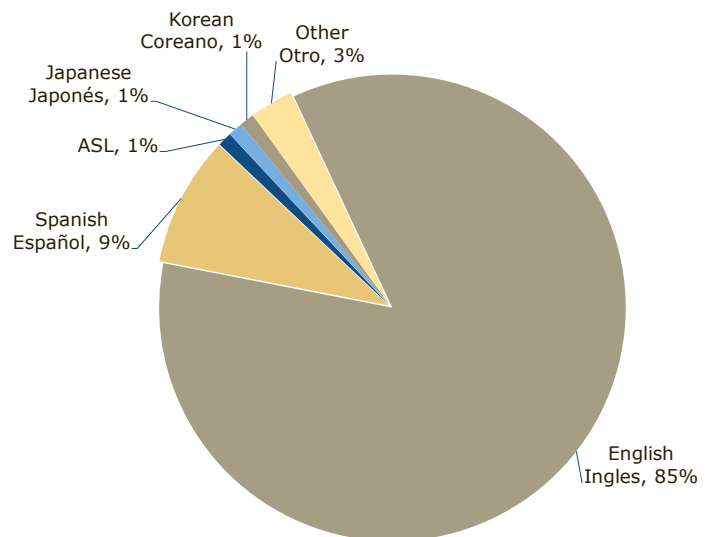
RESPONDENT DEMOGRAPHICS DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Ethnicity Etnia



RESPONDENT DEMOGRAPHICS DATOS DEMOGRÁFICOS DE LOS ENCUESTADOS

Preferred Language Idioma preferido



Information and Communication Información y comunicación

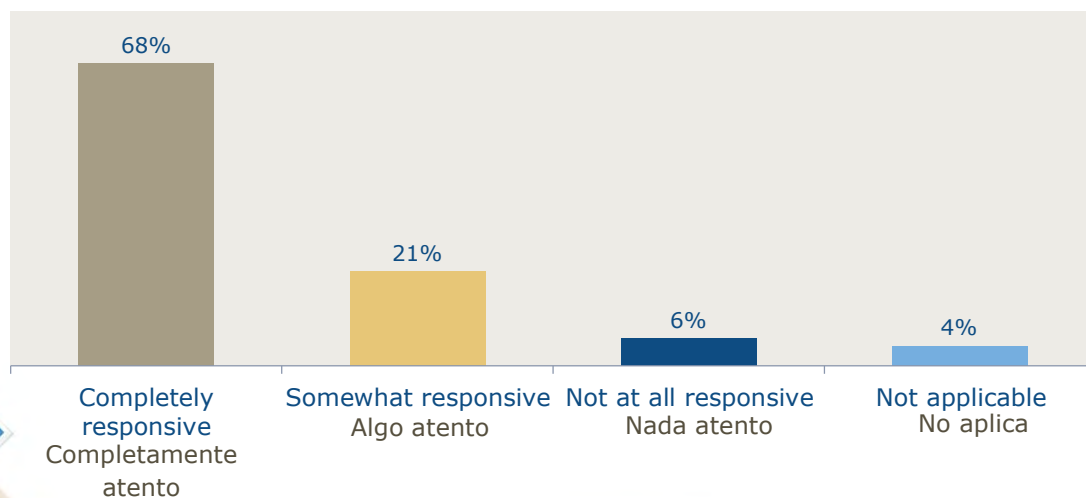
This section of the survey asked for feedback about the content of information Harbor provides, whether it is easy to access and understand, and whether it helps individuals and families make informed decisions about services and supports.

En esta sección de la encuesta se pidió opiniones sobre el contenido de la información que Harbor proporciona, si es de fácil acceso y comprensión y si ayuda a las personas y familias a tomar decisiones informadas sobre los servicios y apoyos.



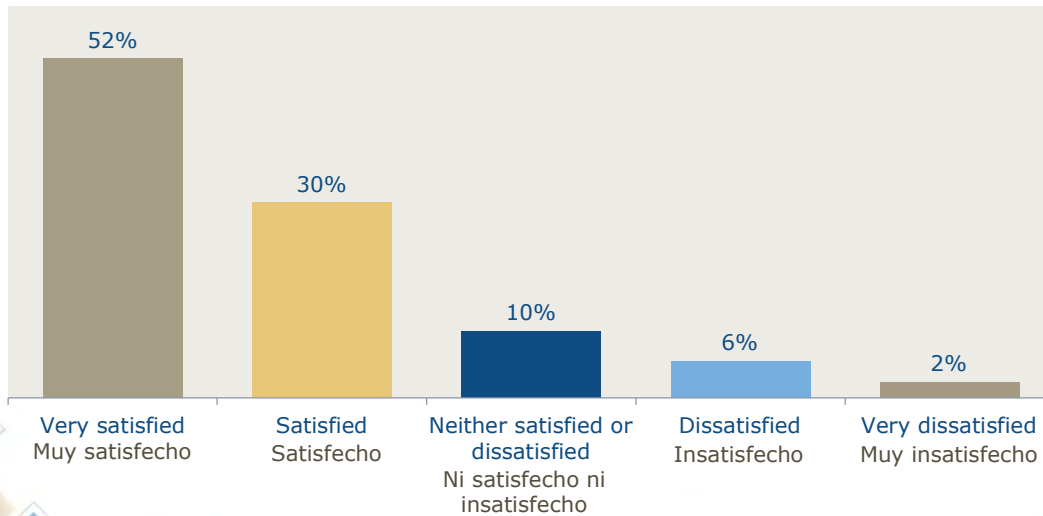
How responsive (i.e., how quick and positive) is Harbor when you have requested information or materials?

¿Qué tan atento (p. ej., qué tan rápido y positivo) ha sido Harbor cuando usted ha solicitado información o materiales?



Overall, how satisfied are you with the information and materials provided by Harbor?

En general, ¿cuál es su grado de satisfacción con la información y los materiales que proporciona Harbor?



The Information Provided by Harbor...
La información que proporciona Harbor...

Agree
De acuerdo

Strongly Agree
Totalmente de acuerdo

Helps me make informed decisions about services and supports.
Me ayuda a tomar decisiones informadas sobre los servicios y apoyos.

33%

50%

Is respectful of my culture.
Es respetuosa con mi cultura.

31%

52%

Is person centered (focuses on my needs, values and preferences).
Está centrada en la persona (se centra en mis necesidades, valores y preferencias).

33%

50%

Is easy to understand.
Es fácil de entender.

36%

50%

Is relevant to me.
Es relevante para mí.

34%

48%

Is sensitive to the cultural diversity of Harbor's community.
Es sensible a la diversidad cultural de la comunidad de Harbor.

31%

48%

Ways to receive information from Harbor Cómo recibe información de Harbor	Current Way Ahora	Preferred Way Preferido
Email Correo electrónico	65%	72%
Harbor Service Coordinator Coordinador de servicios de Harbor	58%	53%
Harbor Newsletter Boletín de Harbor	25%	22%
Harbor Flyers and Brochures Volantes y folletos de Harbor	28%	27%
Harbor Fact Sheets Hojas informativas de Harbor	19%	19%
Harbor Website Sitio web de Harbor	13%	10%
Other Harbor Staff Otro personal de Harbor	9%	7%
Text Message Mensaje de texto	8%	21%
Facebook Facebook	3%	4%
Blog Blog	2%	2%
Instagram Instagram	1%	3%

Person-Centered Service Planning Planeación de servicios centrados en la persona

The third section of the survey focused on individuals' and families' experiences with the person-centered service planning process during their own or their loved ones Individualized Family Service Plan (IFSP) or Individual Program Plan (IPP) meetings.

La tercera sección de la encuesta se centró en las experiencias de las personas y familias con el proceso de planeación de los servicios centrados en la persona durante las reuniones del Plan de Servicios Individualizado para la Familia (IFSP) o del Plan de Programa Individualizado (IPP) de ellas mismas o de sus seres queridos.



Person Centered Service Planning Planeación de servicios centrados en la persona	Annual Survey Encuesta anual	After IPP Survey Encuesta después de IPP
	Agree/Strongly Agree De acuerdo/Totalmente de acuerdo	Agree/Strongly Agree De acuerdo/Totalmente de acuerdo
My IFSP/IPP meeting was held at a time and location that was convenient for me. Mi reunión del IFSP/IPP se celebró a una hora y en un lugar convenientes para mí.	94%	99%
My service coordinator listened to me. Mi coordinador de servicios me escuchó.	94%	99%
My service coordinator supported me in talking about things that are important to me. Mi coordinador de servicios me ayudó a hablar de las cosas que son importantes para mí.	93%	99%

Person Centered Service Planning Planeación de servicios centrados en la persona	Annual Survey Encuesta anual	After IPP Survey Encuesta después de IPP
	Agree/Strongly Agree De acuerdo/Totalmente de acuerdo	Agree/Strongly Agree De acuerdo/Totalmente de acuerdo
My service coordinator respected my choices and opinions. Mi coordinador de servicios respetó mis decisiones y opiniones.	93%	99%
My service coordinator was skilled in developing my/my family member's IFSP/IPP. Mi coordinador de servicios estaba capacitado para elaborar el IFSP/IPP de mi familiar o mío.	87%	99%
My/my family member's IFSP/IPP is person centered (focuses on my needs, values and preferences). Mi IFSP/IPP o el de mi familiar está centrado en la persona (se centra en mis necesidades, valores y preferencias).	88%	99%
My/my family member's IFSP/IPP meets my/my family member's needs. Mi plan IFSP/IPP o el de mi familiar satisfacen mis necesidades o las de mi familiar.	87%	99%

Diversity of Service Providers Diversidad de los proveedores de servicios

The last section of the survey was about the Diversity of Harbor's Provider Community. This section was specifically for those who receive Harbor-funded services in addition to case management. They were asked for their views about the diversity of Harbor's service providers, especially those who support them.

La última sección de la encuesta trató sobre la diversidad de la comunidad de proveedores de Harbor. Esta sección era específica para quienes reciben servicios financiados por el Harbor además de la administración de casos. Se les pidió su opinión sobre la diversidad de los proveedores de servicios del Harbor, especialmente quienes los apoyan.



Diversity of Harbor's Provider Community Diversidad de la comunidad de proveedores del Harbor

Agree
De acuerdo

Strongly Agree
Totalmente de acuerdo

I had several providers to choose from before deciding who could best meet my needs and preferences.

Tuve varios proveedores entre los que elegir antes de decidir quién podía satisfacer mejor mis necesidades y preferencias.

27%

37%

My service providers support me in a way that respects my culture.

Mis proveedores de servicios me apoyan de una forma que respeta mi cultura.

31%

59%

My service providers communicate with me in my preferred language.

Mis proveedores de servicios se comunican conmigo en mi idioma preferido.

25%

70%

Diversity of Harbor's Provider Community Diversidad de la comunidad de proveedores de Harbor

Agree
De acuerdo

Strongly Agree
Totalmente de acuerdo

My service providers give me information and materials that are easy to understand.

Mis proveedores de servicios me dan información y materiales fáciles de entender.

26%

64%

My service providers have staff from different cultures who speak different languages.

Mis proveedores de servicios tienen personal de diferentes culturas que hablan diferentes idiomas.

27%

50%

I believe Harbor has service providers who can meet the different cultural and language needs of our community.

Creo que Harbor cuenta con proveedores de servicios que pueden satisfacer las diferentes necesidades culturales y lingüísticas de nuestra comunidad.

30%

55%

Customer Service Servicio de atención al cliente

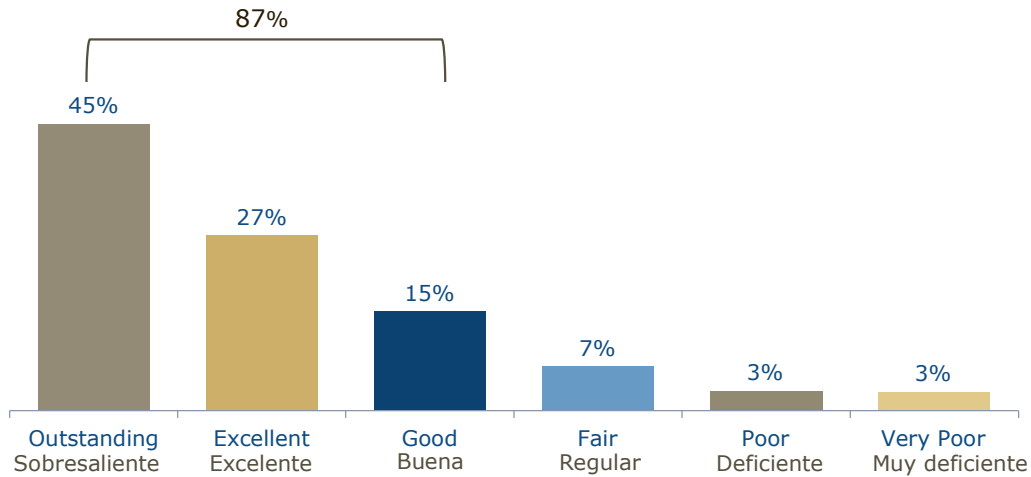
The customer services section of the survey asked about the quality of the customer service received from Harbor staff *over the past six months*, especially in the areas of professionalism, positive attitude, respect and communication.

La sección de servicio de atención al cliente pidió opiniones sobre la calidad del servicio de atención al cliente que proporcionó el personal de Harbor en los últimos seis meses, especialmente en las áreas de profesionalismo, actitud positiva, respeto y comunicación.



Rate Harbor's customer service based on your experiences over the past six months

Califique el servicio de atención al cliente de Harbor en función de sus experiencias en los últimos seis meses



Harbor's Customer Service based on experiences over past 6 months...

Servicio de atención al cliente del Harbor en función de las experiencias en los últimos seis meses...

	Usually Normalmente	Always Siempre
Staff respond in a timely manner to emails, calls and/or letters. El personal responde puntualmente a los correos electrónicos, llamadas o cartas.	23%	57%
Staff are courteous during interactions. El personal es cortés durante las interacciones.	16%	75%
It is easy to contact staff when I want to speak with someone. Es fácil contactar con el personal cuando quiero hablar con alguien.	21%	57%
Staff provide me with accurate information that is easy to understand. El personal me proporciona información precisa y fácil de entender.	20%	64%

Harbor's Customer Service based on experiences over past 6 months...

**Servicio de atención al cliente del Harbor en
función de las experiencias en los últimos seis
meses...**

	Usually Normalmente	Always Siempre
Staff offer solutions and/or alternatives to address my problems/concerns. El personal ofrece soluciones o alternativas para abordar mis problemas/preocupaciones.	17%	61%
Staff are sensitive to my culture and preferences. El personal es sensible a mi cultura y mis preferencias.	17%	65%
Staff communicate with me in my preferred language. El personal se comunica conmigo en mi idioma preferido.	8%	84%
Staff listen to my concerns. El personal escucha mis preocupaciones.	14%	73%

Ongoing Customer Service Survey

240 surveys submitted between July 1 and June 30, 2025

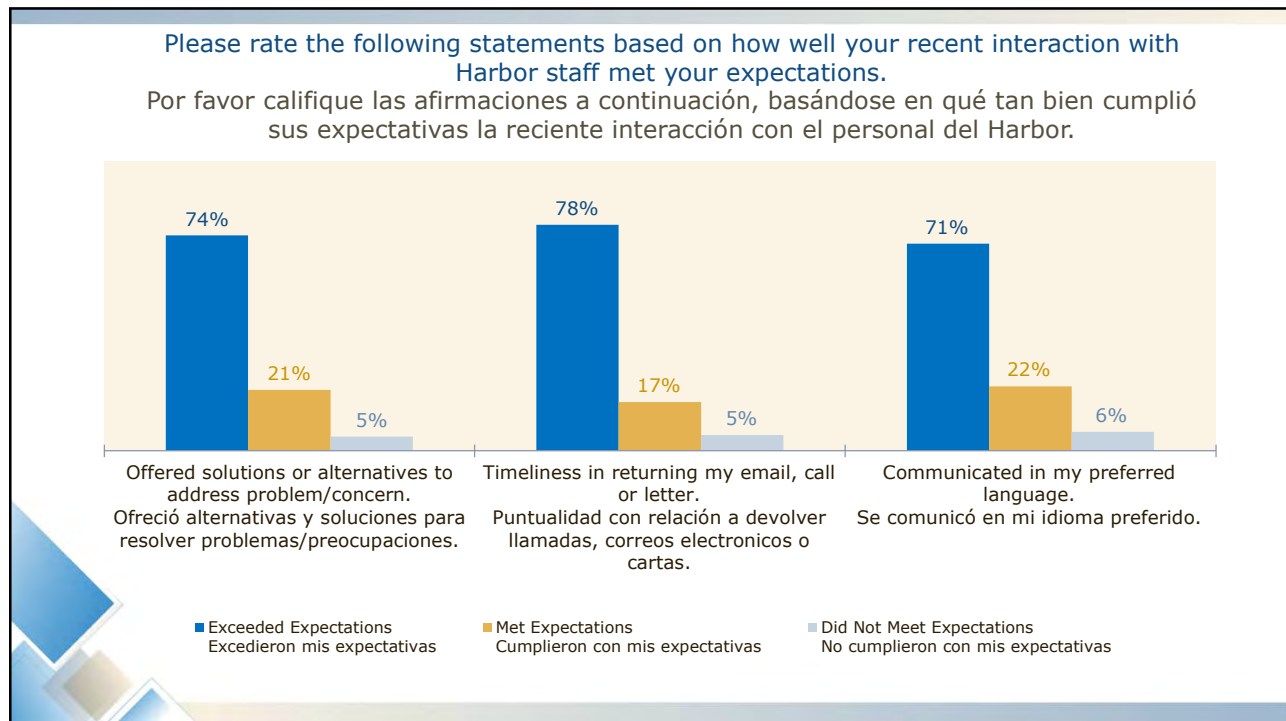
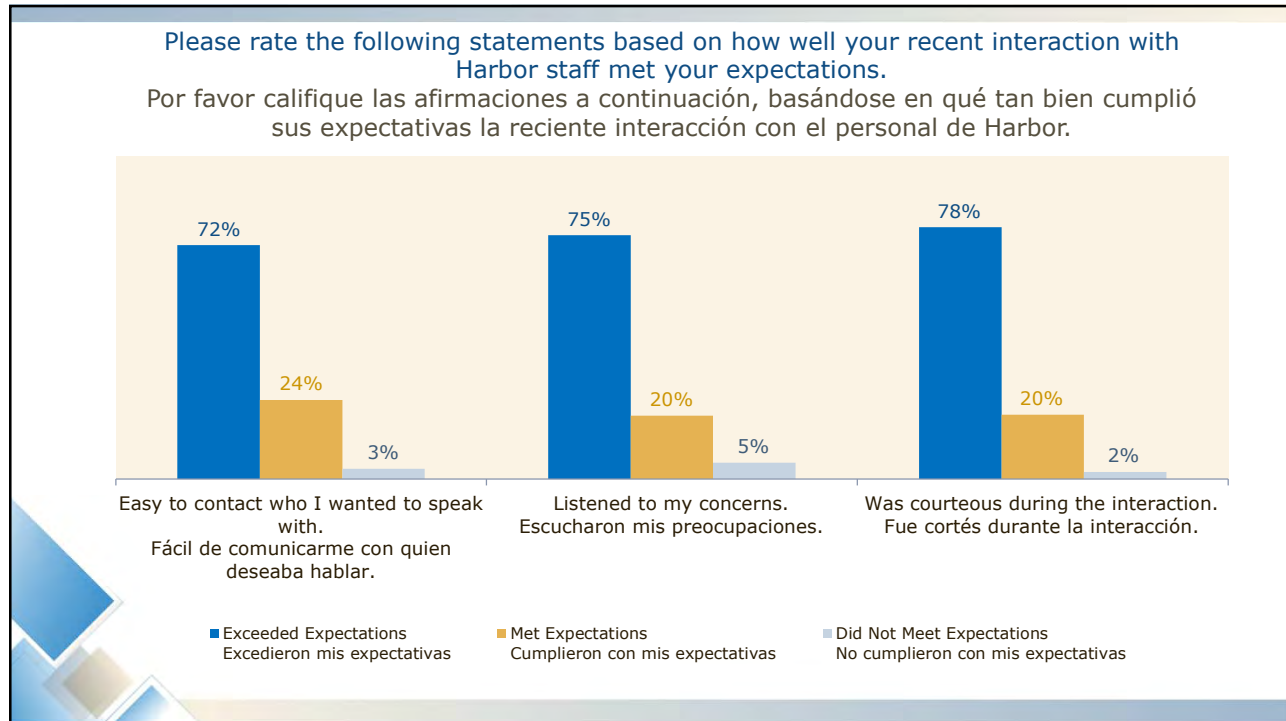
87% completed by individuals, their families, or their circles of support



Encuesta continua de satisfacción del cliente

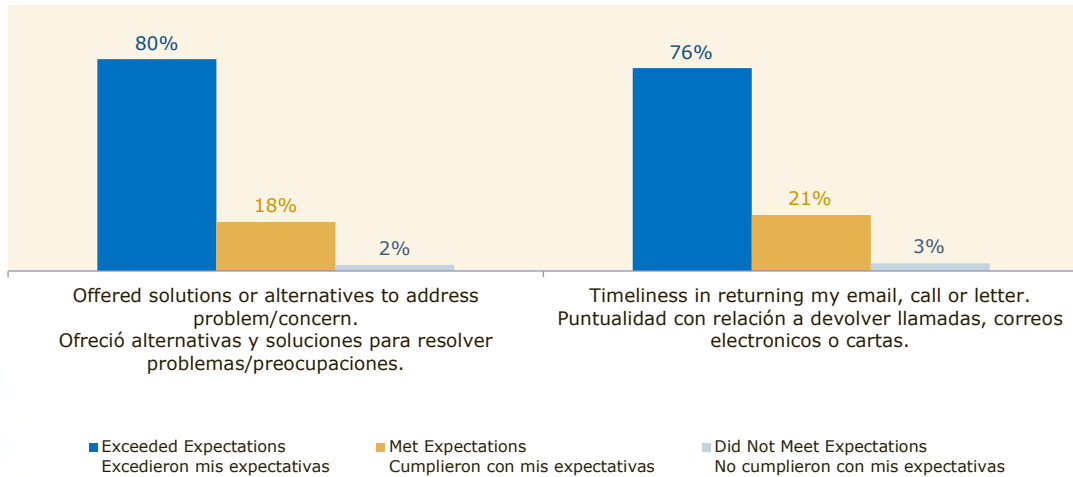
240 encuestas enviadas entre el 1 de julio y el 30 de junio de 2025

El 87 % completadas por personas, sus familias o sus círculos de apoyo



Please rate the following statements based on how well your recent interaction with Harbor staff met your expectations.

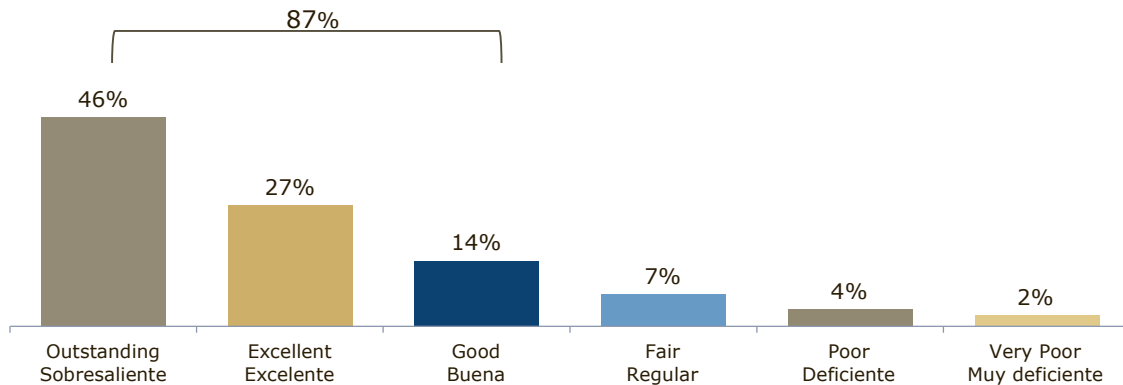
Por favor califique las afirmaciones a continuación, basándose en qué tan bien cumplió sus expectativas la reciente interacción con el personal de Harbor.



Overall Experience & Satisfaction from Annual Survey Experiencia general y satisfacción según la encuesta anual



Rate your overall experiences and satisfaction with
Harbor Regional Center
*Califique su experiencia y satisfacción en general con
el Centro Harbor Regional*



Harbor Regional Center Plans Planes del Centro Regional Harbor

NCI and other Harbor survey results provide us with current opportunities for improvement.
Los resultados del NCI y otras encuestas de Harbor nos proporcionan oportunidades actuales de mejora.



- Ongoing Person Centered Thinking and Service Plan Facilitation training continues for all staff. Se continúa con la formación continua en pensamiento centrado en la persona y facilitación de planes de servicio para todo el personal.
- Expand Harbor's Community of Practice to embed person-centered practices internally and throughout our service provider community. Ampliar la comunidad de prácticas de Harbor para integrar las prácticas centradas en la persona a nivel interno y en toda nuestra comunidad de proveedores de servicios.
- Ongoing staff training on Harbor Regional Center Universal Standards for customer service. Formación continua del personal sobre las normas universales del Centro Regional Harbor para la atención al cliente.
- Targeted efforts to hire staff who speak threshold languages and to lower caseloads. Esfuerzos específicos para contratar personal que hable idiomas minoritarios y reducir el número de casos.
- Continue using NCI survey results and implementing our own surveys to measure Harbor's progress and the satisfaction of those we serve. Continuar utilizando los resultados de la encuesta del NCI y aplicando nuestras propias encuestas para medir el progreso de Harbor y la satisfacción de las personas a las que prestamos servicio.
- Expand resource development efforts to meet the geographic, linguistic, and cultural needs of those we serve. Ampliar los esfuerzos de desarrollo de recursos para satisfacer las necesidades geográficas, lingüísticas y culturales de las personas a las que prestamos servicio.



Recommendations? ¿Recomendaciones?

Do you have any ideas or suggestions?

Email by 10/15/25
publicinput@harborrc.org

¿Tiene alguna idea o sugerencia?

Correo electrónico antes del 15/10/25
publicinput@harborrc.org

Thank you! ¡Gracias!



We appreciate everyone who provided this valuable feedback to us!
¡Agradecemos a todos los que nos han proporcionado estos valiosos comentarios!



We are dedicated to listening to and receiving feedback from our community.
Estamos comprometidos con escuchar y recibir comentarios de nuestra comunidad.

Continue to share your input

Siga compartiendo sus opiniones:

- NCI Surveys Encuestas del NCI
- Harbor Regional Center Surveys Encuestas de Harbor
- Focus Groups Grupos focales
- Listening Sessions Sesiones de escucha



Visit www.harborrc.org regularly for updates.

Visite www.harborrc.org con regularidad para obtener información actualizada.



BOARD COMMITTEES



**Harbor Regional Center
Board Planning Committee
Meeting Minutes
August 12, 2025**

Members In Attendance:	Others In Attendance:
G. David Gauthier, Chair, Board Member	LaVelle Gates, Board President
Ron Bergmann, Board Member	Fu-Tien Chiou, Board Treasurer
Dr. Jim Flores, Board Secretary	Ann Lee, Board Member
Thao Mailloux, Director of Strategic Communications & Engagement, Harbor Regional Center	Patricia Jordan, Board Member
	Patrick Ruppe, Executive Director, Harbor Regional Center
Members Absent:	LeeAnn Christian, Consultant
Laurie Zaleski, Board Member	
Gordon Cordona, Board Member	

The members of the committee met virtually on August 15, 2025 at 5:30pm.

Review of Harbor's Vision, Mission, and Guiding Values

During the virtual meeting, the members of the Board Planning Committee and additional members from Harbor's Board of Trustees participated in a review of the trustees' delegated responsibilities related to the periodic review of Harbor Regional Center's vision, mission, and guiding values statements. This process was last completed in 2022 ahead of the organizations' inaugural strategic planning efforts. The current review of these statements would lead to the upcoming strategic planning efforts in October.

To inform the discussion, members took into consideration the feedback Harbor received from focus groups (consisting of individuals and families served by Harbor and community-based organizations), feedback from Harbor's senior leadership team, and various lessons learned over the course of embedding our mission into aspects of Harbor Regional Center operations.

The members reviewed Harbor's current, existing statements and actively discussed revisions. At the conclusion of the meeting, members were in agreement to further review the statements for accuracy before moving forward recommendations to Harbor's Executive/Finance Committee for further review and input.

Additional Input/Review Following Meeting

The Board Planning Committee took additional time to review the revised statements, with no additional recommended changes. The members who participated in the committee meeting also took additional time to review the proposed statements. As of 8/29/25, consensus was reached to move the revised statements to Harbor's Executive/Finance Committee meeting on 9/2/25.



**Harbor Regional Center
BOARD DEVELOPMENT COMMITTEE MEETING MINUTES
September 10, 2025**

IN ATTENDANCE:
Joe Czarske, Chair & HDDF Board Vice President
LaVelle Gates, HDDF Board President
Fu-Tien Chiou, HDDF Board Treasurer
Ann Lee, Ph.D., HDDF Board Member - ABSENT
Chris Patay, HDDF Past President
Patrick Ruppe, HRC Executive Director
Jennifer Lauro, HRC Executive Assistant - ABSENT

Meeting Minutes:

The Board Development Committee held a meeting on September 10, 2025 at 2:30 pm via Zoom to review the following:

1. Board Composition Update
2. Board Term Review
3. Board Recruiting
4. 2026 Board Presentation & Training Ideas

Next Meeting:

- The next meeting will be on September 10, 2025



CLIENT ADVISORY COMMITTEE MINUTES

Meeting Date: August 13, 2025 | **Time:** 5 PM | **Meeting location:** Zoom

ATTENDEES:

Patricia Jordan (Member/Chair)
Deborah Howard (Member)
Mead Duley (Member)
Tim'an Ford (Member)
Deaka McClain (Member)
Judy Taimi (Harbor)

AGENDA TOPICS:

Time allotted 5:00 – 6:00 PM

Agenda Topic: Supported Employment and Transportation Services

Quorum: Met

The committee discussed:

- Supported Employment Services
 - o The committee received a presentation on supported employment services where we reviewed the following:
 - Employment First Policy according the Lanterman Act
 - Different phases of supported employment: job development, job coaching, and funding partnership
 - Types of employment Supports
 - Paid Internship Program (PIP)
 - Customized Employment/Tailored Day services
 - Project Search (Non-paid Internship)
 - College 2 Career (C2C) Program
 - Reviewed the assessment process of this service
 - In partnership with the service coordinator and the planning team- employment services for the individual are being explored based on the individual's goals for employment
- Transportation Services
 - o The committee received a presentation on supported employment services where we reviewed the following:
 - Transportation services according to the Lanterman Act



- Different types of transportation services and supports
 - Destination Training/Mobility Training
 - Bus Pass
 - ACCESS Transportation
 - Participant Directed Transportation
 - Contracted Transportation
- Reviewed the assessment process of this service
 - In Partnership with the individual and the planning team, the service coordinator assesses for the least restrictive mode of transportation for the individual based on their needs.

Next Meeting: November 12, 2025 at 5 PM via zoom



CLIENT SERVICES COMMITTEE MINUTES

Meeting Date: July 22, 2025 | **Time:** 6 PM | **Meeting location:** Zoom

ATTENDEES:

Ramon Gonzalez (Member)	Shirlys Gruber (Parent)
Fu-Tien Chiou (Member)	Tomasa Mendez (Parent)
David Gauthier (Member/Chair)	Minerva Flores (Parent)
Deaka McClain (Member)	Silvia Bautista (Parent)
Guadalupe Nolasco (Member)	Teresa Hernandez (Parent)
Silvia Macias (Member)	Paula Martinez (Parent)
Silvia Chavez (Parent)	Silvia Calles (Parent)
Maria Chavez (Parent)	Maria Poblete (Parent)
Ivon Muniz (Parent)	
Lucy Paz (Interpreter)	
Judy Taimi (Harbor)	

AGENDA TOPICS:

Time allotted 6:00 – 8:00 PM

Agenda Topic: Harbor Service Policy Review

Quorum: Met

The committee reviewed Harbor's current service policy for the In-Home Nursing Services Policy and Adult Supports Services Policy and had the following discussion:

- In-Home Nursing Services Policy
 - o Simple language to be incorporated into the policy to make it easier for the reader to understand
 - o Remove the word '*protest*' and use the word '*support*'
 - o The definition on the policy is good and should remain the same
 - o Suggestion to replace the word '*fragile*' with '*medically vulnerable or medically compromised*'
 - o Elaborate on the available services and what is being provided for the individual
 - o Use person-centered language
- Adult Supports Service Policy
 - o Change 'connecting supports' to what that entails for the provider and the individual served



- o Remove the conditions set for the policy making is restrictive for the individual and their circle of supports to access
 - o Care for their family member in their family home
- The committee voted on their suggestions to be forwarded to the Harbor team for review.

Next Meeting: September 23, 2025 via zoom

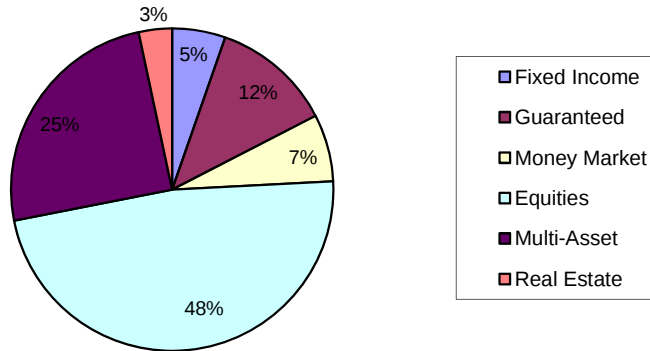
Harbor Regional Center
Retirement Plan Balances as of 6-30-2025

	401(k) Employer Contributions	401(k) Employee Contributions	457(b) Employee Contributions	Total Balance
Fixed Income	\$3,273,248	\$1,225,261	\$60,797	\$4,559,305
Guaranteed	\$6,322,333	\$3,416,713	\$562,790	\$10,301,836
Money Market	\$4,653,388	\$1,088,405	\$10,845	\$5,752,638
Equities	\$29,163,726	\$11,188,681	\$358,904	\$40,711,312
Multi-Asset	\$15,999,439	\$5,029,313	\$49,489	\$21,078,241
Real Estate	<u>\$1,925,409</u>	<u>\$912,691</u>	<u>\$30,633</u>	<u>\$2,868,733</u>
Total	\$61,337,543	\$22,861,065	\$1,073,457	\$85,272,066

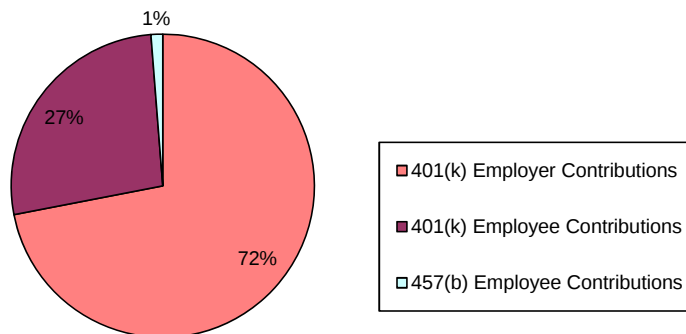
* Plan Balances include active and terminated employees still in the Retirement Plan.

** Employee Contributions include **\$2,328,912** in Rollover funds.

Balance by Fund



Source of Funds



Harbor Regional Center
Retirement Plan Balances as of 6-30-2025

	<u>401(k)</u>	<u>457(b)</u>
Fund Balance 3/31/25	\$77,937,631	\$1,005,709
Activity 4/1/25 - 6/30/25		
Distributions	(\$1,218,535)	(\$60)
Contributions	<u>\$1,834,779</u>	<u>\$25,759</u>
Net	\$78,553,874	\$1,031,407
Fund Balance 6/30/25	\$84,198,608	\$1,073,457
Gain/(Loss)	\$5,644,734	\$42,050
% Gain/(Loss) for the Period	7.24%	4.18%

Participants

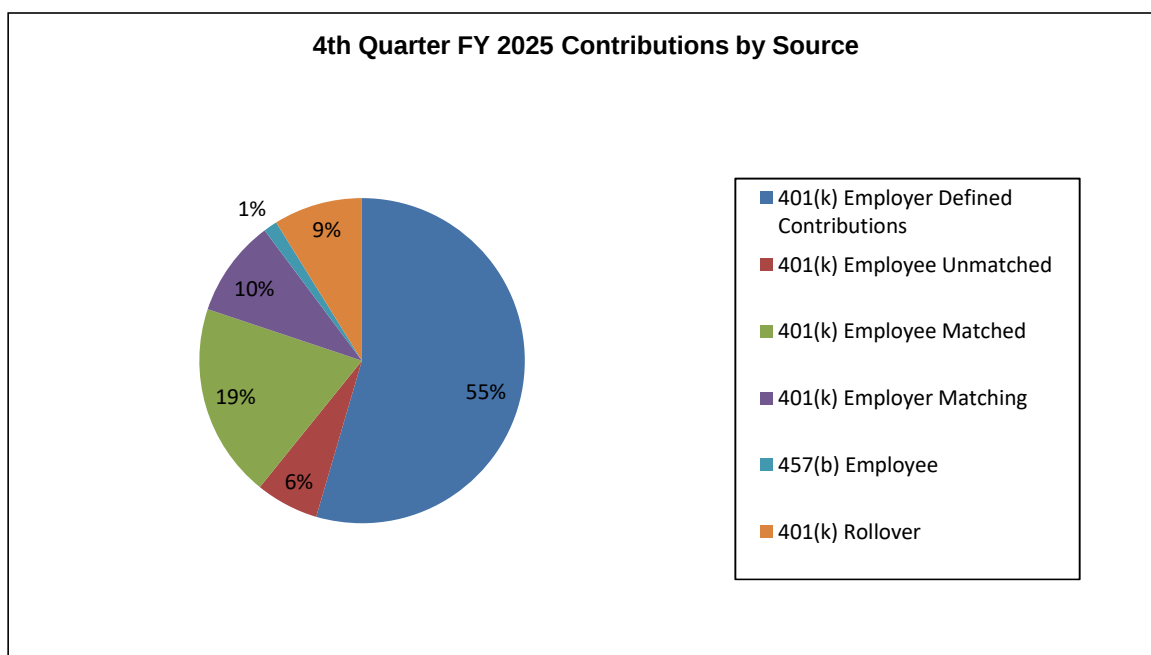
Active Employees in Retirement Plan	478	5	64%
Terminated Employees in Retirement Plan	265	4	36%
Active Employees Total Balance	\$56,187,959	\$529,423	67%
Terminated Employees Total Balance	\$28,010,649	\$544,034	33%

Loan Information

	<u>6/30/25</u>
Employees with Loans	
Active Employees with Loans	49
Terminated Employees with Loans	<u>2</u>
Total	51
Average Balance Amount	\$9,854
Loan Value	
Total Loan Value	\$502,541

Harbor Regional Center
Retirement Plan Balances as of 6-30-2025

	<u>401(k)</u>	<u>457(b)</u>
<u>Contributions</u>		
Employer		
Defined (10%)	\$1,015,000	\$0
Matching (50% of Employee Matched)	\$179,510	\$0
Employee		
Matched (up to 6%)	\$359,020	\$0
Rollover	\$164,646	\$0
Unmatched	<u>\$116,604</u>	<u>\$25,759</u>
Total	\$1,834,779	\$25,759
Employees Contributing	331	
Average deferral percentage	6.02%	



HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
August 6, 2025

Opening:

The regular meeting of Harbor Self Determination Advisory Committee was called to order at 6:07 PM on Wednesday, August 6, 2025, via Zoom by Deaka McClain – Chair.

Quorum was established.

Committee Member Present:

Deaka McClain – Individual, Self-Determination Advisory Committee Chair

Miriam Kang – Parent

Tim'an Ford – Peer Advocate

Jamie Temple Zoller – OCRA

David Gauthier – Individual

Kathy Maye – Parent

Shirlys Gruber – Parent

Mayra Garcia – Parent

Harbor Staff Present:

Patrick Ruppe – Executive Director

Antoinette Perez – Director

David Hernandez – PCS

Ricardo Orozco – PCS

Bernice Perdomo – CSM

Jessica Sanchez – CSM

Erika Castillo – CSM

Erika Godoy – CSM

Jimmy Silvestre – CSM

Johnny Granados – CSM

Kelsey Machado – CSM

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
August 6, 2025

Visitors:

Nayeli Strong – Interpreter

Albert Feliciano – SCDD

Kim Sinclair – ASLA

Preselah Seymore – GT Independence FMS

Qiong Zeng – NavAble Facilitation

Rebecca LaBoriel – Guidelight Group

Adriana Ortiz

Araceli Lopez

Celia Ortiz

Esmeralda Moa

Flerida Meza

Jackie Rubio

Jazmin Chandler

Maria Poblete

Natima Nelly

Reiko Umeda

Rosie Lasca

Sara Martinez

Silvia Calles

Tomasa Menendez

Yanet Ramirez

Jordan

Junko Kubo

Kayley Pronenza

Montserrat Palacios

Abbreviations:

Harbor: Harbor Regional Center

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
August 6, 2025

IF: Independent Facilitator

PCP: Person-Centered Plan

SCDD: State Council on Developmental Disabilities

SDP: Self-Determination Program

DVU: Disability Voices United

FMS: Financial Management Service

DDS: Department of Developmental Services

RFP: Request for Proposal

SDAC: Self-Determination Local Advisory Committee

OCRA: Office of Clients' Rights Advocacy

ASLA: Autism Society of Los Angeles

Welcome:

Introductions of committee members and guests via the chat. Deaka asked members to identify themselves by adding "Member" or "Parent" next to their name in Zoom. Present committee members opened camera and introduced themselves.

Approval of Minutes:

June 4, 2025 minutes were posted for review. Motion to approve the minutes made by Miriam Kang, seconded by Tim'an Ford.

Minutes were approved.

Committee Members Responsibilities and Agreements:

Committee Responsibilities:

- attend meetings regularly and commit to being on time
- be mindful of participants' time by helping keep meetings on track
- listen attentively
- maintain an open mind towards others
- support the actions and efforts of the committee

Committee Agreements:

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
August 6, 2025

- We agree to be respectful of each other
- We agree to respect privacy by not sharing any personal information
- We agree to only ask questions and share comments related to the SDP
- During public comments, raise your hand and wait to speak until called
- One comment per person, unless there is time for additional questions or comments
- If your questions were not answered during the meeting, email your Harbor service coordinator or Harbor PCS team

Committee Chair Statewide Updates:

- Training & Orientation: Strong need identified for more standardized training and orientation for local advisory committee members.
- Accessibility: Desire for improved accessibility and outreach to increase public participation in SDAC meetings.
- Budget Concerns: Concerns about lack of clarity regarding the annual budget renewal process.
- Data Needs: Request for more detailed data from DDS regarding SDP implementation.
- Trailer Bill Updates: Highlights included requirements for IPP teams to consider generic resources; statewide standardized procedures by March 1, 2027; protections ensuring regional centers cannot prohibit allowable services; and updates around initial budgets and discussion of unmet needs.
- DDS Updates: Focus on standardizing practices for FMS providers; developing facilitator certification; and providing a standardized spending plan template.
- Public Comments: Concerns regarding transparency, rate increases, unmet needs, and caregiver succession planning.
- Next Steps: Explore hosting a town hall event with providers, service coordinators, and families to strengthen collaboration.

Harbor Regional Center Monthly Updates:

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
August 6, 2025

David Hernandez presented the SDAC Survey Results

- 82% want ongoing SDP success stories shared.
- 73% want updates on new SDP materials and Harbor's implementation.
- 64% want updates from providers and community partners.
- 55% want continued data presentations, ideally twice per year.
- Training priorities: Independent Facilitators (64%), Spending Plans (60%), Budgets (55%).

SDAC Retreat

- Saturday, October 25, 2025, 10:00 AM – 12:00 PM at Harbor Torrance office. Topics include roles/responsibilities and team building.

SDP Resource Fair

- Planned for late March or early April 2026
- 55% of members expressed interest in participating in the event.

Public Comments:

- Concerns raised regarding interpretation access; the meeting shifted to consecutive interpretation to ensure inclusion.
- Request for clearer communication about eligibility for events (e.g., backpack giveaway).
- Appreciation expressed for staff responsiveness and transparency.

Harbor Events and Announcements:

- Supported Employment & Transportation Training: August 7, 2025 (in-person, Torrance) and August 23, 2025 (Zoom).
- Backpack Giveaway: August 12, 2025, 10:00 AM – 1:00 PM at Harbor Resource Center (for Harbor clients and their siblings).
- Email Basics Workshop: August 20, 2025, 6:00 PM at Torrance Civic Center, in partnership with the Latino Center.

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
August 6, 2025

- Next SDAC Meeting: Wednesday September 3, 2025, from 6:00 PM – 8:00 PM via Zoom.
- Upcoming Orientations:
 - August 7, 2025 (English) 1 PM - 4 PM
 - August 21 2025 (Spanish) 5 PM – 8 PM

Closing:

- Chair Deaka McClain closed the meeting with “Teamwork makes the dream work.”
- Meeting adjourned at 8:10 PM

Minutes submitted by Kelsey Machado

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
September 3, 2025

Opening:

Harbor Self Determination Advisory Committee (SDAC) was called to order at 6:04 PM on Wednesday, September 3, 2025, via Zoom.

Quorum was established.

Committee Member Present:

Deaka McClain – Individual, Committee Chair

Tim'an Ford – Peer Advocate

Miriam Kang – Parent

Wendy Clutterbuck – Parent

Kathy Maye – Parent

Shirlys Gruber – Parent

Mayra Garcia – Parent

David Gauthier – Committee member

Harbor Staff Present:

Antoinette Perez – Director

LaWanna Blair – Director

Ricardo Orozco – PCS

Bernice Perdomo – CSM

Bryan Sanchez – CSM

Jimmy Silvestre – CSM

Kelsey Machado – CSM

Visitors:

Lucy Paz – Interpreter

Natima Nelly – OCRA

Albert Feliciano –SCDD

Sonni Charness – Guide light Group

Kim Sinclair - ASLA

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
September 3, 2025

Yolanda Gomez

Tamra Pauly

Sheila Jones

SE

Gilberta Castellanos

Sara Santogrossi

Preselah Seymore – GT Independence

Junko Kubo

Kim Sinclair

Maria G Santos

Maria Poblete

Maria Zavala

Mariela Avila Garcia

Marleni Pineda

Ivan Ramirez

Ivon Muniz Diaz

Jamie Van Dusen

Jazmin Chandler

Jennette Lotrean

Adelayda

Adriana Ortiz

Allan Bravo

Amelia Castellanos

Brianna Viltz

Carmen Vasquez

Claire Seo

Deborah Smith

Zora Ngai

Veronica Del Cid

Rene Hurst

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
September 3, 2025

Rubi Saldana

Lulu

Naomi Hagel – Phoenix

Michelle David

Reiko Umeda

Michael Velasco

Jorge Ramos

Kayley Proenza

Cicile Taliaferro

Donnell Hill

Adelayda

Brandi Pollard

Cendy Topete

Andrea

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ASLA: Autism Society of Los Angeles

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
September 3, 2025

Welcome:

Introductions of committee members and guests via the chat. Present committee members opened camera and introduced themselves.

Approval of Minutes:

August 6, 2025 minutes were reviewed. Motion to approve the minutes made by Kathy Maye, seconded by Miriam Kang.

Minutes were approved.

Committee Members Responsibilities and Agreements:

Mission Statement (read aloud by Wendy Clutterbuck)

Committee Responsibilities (read aloud by Kathy Maye):

- attend meetings regularly and commit to being on time
- be mindful of participants' time by helping keep meetings on track
- listen attentively
- maintain an open mind towards others
- support the actions and efforts of the committee

Committee Agreements (read aloud by Tim'an Ford):

- We agree to be respectful of each other
- We agree to respect privacy by not sharing any personal information
- We agree to only ask questions and share comments related to the SDP
- During public comments, raise your hand and wait to speak until called
- One comment per person, unless there is time for additional questions or comments
- If your questions were not answered during the meeting, email your Harbor service coordinator or Harbor PCS team

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
September 3, 2025

Committee Chair Statewide Updates:

Deaka McClain reported she will attend the statewide Self-Determination meeting in person for the first time. All other meetings will continue via Zoom. Deaka announced the public comments will be taken at two points during this meeting: 1) after Harbor's update and 2) at the end of the meeting. The committee will evaluate whether an addition public comment point allows for more meaningful discussion while also keeping structure. If not, the committee will revert back to previous structure of holding all comments for the end.

Harbor Regional Center Monthly Updates:

- Ricardo Orozco reviewed current FMS at Harbor
 - 16 FMS total
 - 15 using sole employer
 - 14 co-employers
 - Frequent updates to the FMS list on Harbor's website were noted. Families were advised to contact service coordinators with concerns.
- Antoinette Perez presented the RFP funds for the 2024-25 year
 - FY 2024–25 funds total \$97,762.
 - The funds from 2023-24 year were allocated to ASLA/Phoenix and Guide light Group for IF trainings in multipole languages.
 - Questions raised about criteria for accessing training, effectiveness of past funding allocations, and transparency.
 - Harbor will provide committee members with a summary of how previous implementation funds have been allocated and the DDS Directive. The committee will review these documents in advance of the next meeting. Vote will take place during the October meeting for the 2024-25 year
- Ricardo Orozco presented and reviewed the phases of transitioning to SDP.
 - With emphasis on clear communication and service coordinator training.
 - Timelines within phases of SDP are averages and each is dependent on the individuals' unique circumstances and

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
September 3, 2025

the ability for Harbor and participant to reach agreement. However, disagreements should not hold a participant from moving forward as a participant can move forward with the services agreed upon, while simultaneously disputing those that are not agreed upon.

Partner Updates:

- OCRA – Provided updates on rights advocacy services.
- State Council (SCDD) – Shared available resources and statewide updates.

Public Comments:

- Concerns were raised about service limitations and transparency regarding documentation.
- Questions were asked about updated provider lists and the role of PCS team members.
- Multiple IFs expressed interest in being added to Harbor's resource lists.
- Questions raised about training availability for independent facilitators.
- Requests for clarification of Participant Choice Specialists' responsibilities.
- Concerns regarding interpretation issues.
- Concerns regarding wait times of several months to receive budgets.
- Concerns were raised about budget cuts for established services, and the need for fairness in assessments was emphasized.

SDP Success Stories:

Ricardo Orozco shared two SDP participants' success stories and noted the positive impact of the program.

HARBOR REGIONAL CENTER
Self Determination Advisory Committee
Meeting Minutes
September 3, 2025

Closing:

- Upcoming Orientations:
 - September 27, 2025 (Spanish) 9:00 AM – 12:00 PM
- Next SDAC Meeting: October 1, 2025, from 6:00 PM – 8:00 PM via Zoom.
- Meeting adjourned at 8:09 PM

Minutes submitted by Kelsey Machado

Harbor Regional Center
Service Provider Advisory Committee (SPAC)
August 5, 2025, 10:00 a.m.

Committee Participants

Member Name	Organization
Angie Rodriguez	SVS
Violet Ruiz	SVS
Angie Gallon	SVS
Leo Vasquez	SVS
Paul Quiroz	Cambrian Homecare
Diane Sanka	Easter Seals
Sharon Oh	Share Speech & Language
Scott Elliott	ICAN Ca
Baldo Paseta	Ideal Transit
Johanna Torres	David's Place
April Stover	Ability First
Tiki Thompson	Person Centered Options
Monique Weatherson	Person Centered Options
Geobanna Jimenez	Aveanna Healthcare
Audria Pino	First Light Homecare
Evelyn Espinoza	First Light Homecare
Sylvia Owens	CLU -Brainstorm Productions
Elizabeth Flores	Life Steps Foundation
Catalina Medrano	Life Steps Foundation
Yazmin	Branching Tree
Michelle Nguyen	YAI
Self Determined Futures	Valeria Landeros
Crystal Hayes	College Internship
Adina Estrada	PALS Inc
Glenda Lang	Birth & Family Services

HRC Staff Participating

Staff Name	Title
Patrick Ruppe	Executive Director
Judy Wada	Chief Financial Officer
Elizabeth Garcia Moya	Community Services Director
Leticia Mendoza	Department Assistant Community Services
Patricia Piceno	Manager of Community Services
Daniel Hoyos	Manager of Community Services
Brian Carrillo	Provider Relations Specialist
Tes Castillo	Assistant Controller
Cindy Garcia	Provider Relations Specialist
David Hernandez	Participant Choice Specialist
Ricardo Orozco	Participant Choice Specialist

Call to Order

Angie Rodriguez called meeting to order at 10:02 a.m. Meeting began by introductions of SPAC committee.

Sub-Committee Updates

Angie Rodriguez and SPAC Chair Members. The subgroups continue to host individual sub-committee meetings to discuss current issues and concerns.

Sharon Oh, Early Start - Provided an update on the following:

- No meeting since May. In May they discussed rate reform and SAF.
- Discussed reporting timelines.
- The next meeting is 8/7/25

Baldo Paseta, Transportation – Baldo provided an update on the following:

- Participated in the DDS transportation workgroup. They have met about three times.
- These meetings included Burns & Associates; they have agreed to review the formulas on rates.
- Changes to the transportation rates are expected. The workgroup will continue to meet.
- Burns & Assoc. created a survey, only 39 providers responded (only 16%, statewide).

Diane Sanka- Day Program

Last meeting was on July 24th. They discussed the following:

- Updates on the budget as well as legislative updates.
- Anticipated budget cuts,
- SIR errors and ways to fix them,
- Resources for people approached by ICE.
- Reviewed Harbor's plan and discussed making their own plans.

Scott Elliott for Lindsey Stone- Supported Employment

Scott provided an update from their last meeting:

- expressed the committee's concerns about the sun-setting SEP incentives, indicating that this will be fiscally challenging for programs providing SEP, making it difficult to retain staff.

Paul Quiroz - Support Services

Paul provided an updated from their last meeting where they discussed the following:

- standardized respite tool,
- QA protocols,
- SIRs- timeliness and thoroughness.
- Protocols related to ICE.
- Next meeting is in 2 weeks.

HCBS update:

Brian Carrillo, HCBS Specialist provided an update on the upcoming HCBS trainings that are available:

Helen Sanderson and Associates:

- Compassionate at work - tactics to reduce stress for people providing services and how to prevent burnout
- Supported decision making - how to support individuals in keeping their rights while keeping support
- Community Connecting - how to connect the people you support with people in the community
- Curious Conversations – 2 Cohorts – 10 week course – goes over HCBS rules.

IntellectAbility:

- Discovery as a process - help staff approach complex situations using a framework rooted in person-centered approaches
- Decision making and negotiation - help provider staff navigate the steps connected to negotiation that ultimately lead to empowered decision-making
- Coming soon- person centered thinking certification courses

TransCen:

- Future including employment on September 4, 2025 – at Harbor Torrance Office
Family and individual session – addresses myths behind employment
Provider session – train the trainer
Sean Roy presented to SPAC via Zoom on the aforementioned training
Goal to support people towards competitive employment success
Invited providers to attend the event for the professional event
Best way to get a family to attend is a direct invitation – asked providers to directly invite individuals to attend event

ALO:

- HCBS and your rights with vision boarding - How individuals can integrate advocacy rights into their rights
- Targeted HCBS Consultations for identified providers to ensure ongoing HCBS compliance

Update regarding the HCBS Monitoring Directive

- Effective 1/1/26, annual review of all HCBS settings
- Additional services codes will be included
- Compliance will be monitored in various ways
- DDS will release a directive regarding HCBS monitoring

Budget Update

Judy Wada shared a presentation on the Budget Update:

- Budget Enacted FY 25-26 – started July 1
- Main changes:
 - o Caseload growth and Utilization
 - o Full year costs and reforecasts including rate reform and DSP bi-/multilingual pay differential
 - o RCs receiving funding for Public records Act
 - o Funding for Life outcomes Improvement System (LOIS) CM, Acct, SP, Portal for individuals and families – plan to launch in 2028
 - o FY 2025 = \$15.2 billion FY 2026 – 18.2 billion

- System continues to grow every year
 - o Regional Centers Caseload
 - o FY 24-25 = 452,188
 - o FY 25-26 = 491,080
- Quality Incentive Programs and Differentials
- Employment Capacity received by 7/16 are being paid 8/15
- Employment Access received by 7/28 will be paid by 8/15
- Early Intervention Delivery of Services Incentives (for how quickly services were provided by provider) will be paid by 8/31
- Provider Directory one-time (validate PD info by Nov 29) received by 4/22, pay by 8/15. Harbor have not paid service code 862.
- DSP Bi-/Multi-Lingual Pay Differential – program launch is pending.

Judy discussed Trailer Bill Language:

- Rate Reform Hold Harmless – Changed from June 30, 2026 to February 28, 2026
- Eligibility for QIP Rate Component – In order for provider to be able to continue to receive 10% (expires June 2026), provider will need to comply with EVV, HCBS Rules, and Annual Fiscal
- Review and Audit Requirements, as applicable. Harbor will be reaching to those providers who will need to complete an independent audit.

Rate reform – Elizabeth Garcia-Moya

- Elizabeth thanked providers for signing and returning SAFs by June 30th.
- Next steps by 12/31/2025 that need to be accomplished are: Service code changes, billing code changes, sub code changes, rates and new authorizations.
- January challenge was that some providers had not completed provider directory and Harbor will need to go back and change rates for those providers. Retro payments are being established.

Provider Directory (PD) – Elizabeth Garcia-Moya

Elizabeth highlighted changes to the Provider Directory

- For new vendorizations, those who haven't billed in two years and are reactivated, or change in ownership
- Previously, provider eligible for 100% of rate from date of vendorization and then complete Provider Directory. Currently they begin at 90% and then complete the PD and then get the 100%.
- Elizabeth reviewed the PD Process Flow in the DDS Directive.
- Standardized Vendorization through the Provider Directory
- DDS is hosting workgroups
- DDS to have pilot in place by October 2025 (timeline may change). Goal to have full implementation by 1/1/26.
- Any service provider interested in becoming vendored will need to start the process through the Provider Directory to complete initial application.
- Regional centers have 15 days to review the application and inform the service provider if they will be moving forward or not.
- A vendor packet will then be sent to the provider and begin working on a program design. Any necessary changes to the program design will reset the original timeline.

DSP Internship Program - Elizabeth Garcia-Moya

Elizabeth reviewed the DSP Internship Program

- DDS in partnership with All's Well Agency
- Entry –level internship program for those interested in becoming DSPs. Will be paid for up to 30 hours per week for up to 3-months.
- If hired on, can earn up to two retention stipends.
- Providers were informed that they can contact hrcworkforce@harborrc.org if they are interested
- The service provider SVS shared they have had success with the DSP Internship program

DSP Collaborative – Elizabeth Garcia-Moya

Elizabeth highlighted the initiative between regional centers and service providers to promote employment in the field.

- This will be a free job posting site for service providers
- Alta RC and Valley Mountain RC worked to set something up that is user friendly
- Expanding to LA regional centers
- Elizabeth shared platform on the screen
- Harbor will have kickoff events hosting job fairs –seeking service providers interested in collaborating in planning and promotion – Those interested should contact Elizabeth by Friday August, 15th.

DDS Directives, Program Guidelines and Correspondence – Elizabeth Garcia-Moya

- Elizabeth highlighted new service code – 644
Intended to help individual's functional communication through use of formal ASL – circle of support can also be trained. Letter Of Interest (LOI) posted on Harbor's website.
- Intermediate Care Facilities (ICF)
DDS extended lag funding for ICF providers through end of this year. Updated the agreement and attestation form.
- CIE incentive payments
 - o Increased amounts sunset as of June 30, 2025.
 - o If milestone met between 7/1/21-6/30/25, eligible to receive the increased amount
 - o After those dates, as of 7/1/25, they will go back to previous milestone rates:
 - o "CIEP" for 30 consecutive days \$1,000
 - o "CIE6" for 6 consecutive months \$1,250
 - o "CIE12" for 12 consecutive months \$1,500
- Health and safety waivers – Elizabeth highlighted compliance status with the independent fiscal review audit requirement and any corrective action plans or sanctions within the last years.

Strategic Plan – Elizabeth Garcia-Moya

Harbor's strategic plan was approved for July 1, 2023 – June 2026. Harbor is in the final year of the plan. Harbor is seeking feedback to refine our goals. We have developed a survey for this purpose. Providers were encouraged to share their thoughts through participation in the survey.

Service Provider Announcements

Scott Elliott (ICAN) – ICAN's upcoming Halloween festival, will be hosted at SCROC. Scott to share flyers. Last year had 1600 total attendees.

Paul Quiroz (Cambrian) – on August 16th, 10:00 AM -1:00 PM, Cambrian is hosting a workshop on human trafficking. Paul has flyers for those interested.

Krystal Hayes (CIP) started 17 new students yesterday in their program and 24 returning students next week.

Diane Sanka – Easter Seals 25th annual walk is on October 25th - Strides for Disabilities. It is a 3k family fun walk.

Next SPAC meeting is on October 7th



ADJOURNMENT



Next Business Meeting
of the Board

November 18, 2025