

**STATE COUNCIL ON DEVELOPMENTAL DISABILITIES
FACILITATION AND ATTENDANT SERVICES GUIDELINES
FOR
NON-AGENCY MEMBERS**

INTRODUCTION

The Council recognizes that some members may require reasonable accommodations in order to remove barriers which would prevent their full participation. To address this issue, the Council has established guidelines for the provision of support services to non-agency members who require facilitation and/or attendant services.

When it has been determined that a need exists for facilitator and/or attendant services and the member is providing services for the Council, reimbursement is available for these services. Payments that are eligible for reimbursement include those for services provided by individuals working in the support classifications of facilitator or attendant.

Reimbursement for facilitation or attendant services must be reasonable and comply with the State of California reimbursement rules. For guidance, Attachment A identifies costs for Facilitators, Attendants, and Facilitator-Attendants that have been considered reasonable based on factors such as the Council's pay rate of the Support Services Assistant, Hospital Worker, and Psychiatric Technician Assistant classifications, respectively.

DEFINITIONS

The following are definitions for facilitation and attendant services:

1. Facilitation refers to a service wherein the facilitator aids a member to perform the essential functions of his/her position. Assistance is provided based on the needs of the member, and may include some or all of the following:
 - a. Interpretation of policy related information, either written or oral, into a form that is more easily understood by the member.
 - b. Providing, as necessary, an impartial analysis of the relevant issues. The analysis may include, but not necessarily be limited to, alternative positions and the implications and potential consequences for supporting or proposing any particular position. The intent is to provide the member with the knowledge necessary to make informed decisions.

- c. Assisting the member to effectively communicate both positions and questions on relevant issues and/or with remembering or recalling relevant information.
 - d. Support to accomplish other related tasks, such as making travel arrangements and scheduling committee activities on behalf of the member.
2. Attendant service refers to assistance from others which compensate for a person's inability to independently perform activities of daily living. Services may include assistance with maintenance and hygiene, mobility and escort responsibilities, and to a lesser degree, assistance with related cognitive tasks.
3. Both facilitation and attendant services are defined as assisting the member to perform the essential functions of his/her official position. For example, while an individual may require nearly identical assistance from an attendant both in his/her home and while away on Council related travel, these guidelines address only those services directly related to fulfilling the responsibilities of a member.

RESPONSIBILITIES OF FACILITATORS AND ATTENDANTS

The need for, and level of, facilitation or attendant service should be determined largely by the member. During the new member's orientation to the Council, it is critical that the availability and significance of assistance be clearly explained. The new member must be able to make an informed decision as to whether an accommodation is necessary.

It is important to stress that accommodations may include those other than facilitation or attendant services. While these guidelines address only these two forms of accommodation, other forms may be more relevant, such as enlarged print, modified seating arrangements, and travel modalities.

A. FACILITATORS - RESPONSIBILITIES

Facilitators are responsible for providing services that enable the person to function as an integral member of the Council. The following list, though not exhaustive, includes examples of activities with which the facilitator may assist:

1. Developing and maintaining a calendar of Council related meetings and activities that the member must attend. This may include assistance with reconciling subsequent commitments.
2. Making transportation/travel arrangements for Council related meetings.
3. Obtaining and/or managing funds required for taking part in Council related meetings. This may also include follow-up in reconciling any necessary documentation. Examples, if applicable, may include cash advances and travel claims.
4. Preparation prior to Council related meetings through review and interpretation of agenda items. Should the facilitator not understand an issue, he/she is responsible for obtaining any information necessary for clarification.
5. Support during meetings through interpretation of actions or discussions on agenda items. As with preparing for the meeting, if the facilitator does not understand an issue, he/she is responsible for making sure that it is clarified. Assistance may also be provided in following relevant group process rules, such as Parliamentary Procedure.
6. Reviewing after the meeting any actions taken or discussions held.

In addition to the preceding examples of responsibilities, there are two fundamental guiding principles that a facilitator should follow when providing services.

The first principle is that while interpreting, the facilitator must accurately convey both the content and spirit of any spoken or written communication, while at the same time assuring that the information is in a format that is more easily understood. This may be especially difficult when the facilitator disagrees with what has been said or written. The facilitator is not responsible for the content of the communication, only for presenting it accurately.

The second principle is a natural extension of the first. While the person being served is an appointed member of the Council, the facilitator, is not. For this reason, the facilitator should not counsel, advise, or interject personal opinions while assisting the member in carrying out his or her official duties. Doing so may result in inappropriate participation and a likely impermissible exercise of authority by the facilitator.

B. ATTENDANTS - RESPONSIBILITIES

Responsibilities of attendants may include, but are not limited to, the following examples:

1. Assistance with personal maintenance and hygiene, which may include some or all of the following: dressing, grooming, eating, bathing, respiration equipment maintenance, and toilet functions such as bowel, bladder, catheter and menstrual tasks. Assistance assumes knowledge of the member's needs related to these tasks, and of other needs that may require only periodic assistance, such as what to do if the member experiences a seizure.
2. Assisting the Council member with traveling to and from Council related activities.
3. Assistance with mobility tasks, which may include helping the Council member to move from place to place within confined settings. Examples could include movement from a meeting room to a local restaurant or from one chair to another.
4. Assistance with some cognitive tasks, such as reading, money handling, making travel arrangements, simple clerical tasks, and some interpretation of difficult to understand information.

NOTE: Although attendants and facilitators may occasionally provide similar assistance with regard to cognitive tasks, the attendant does so to a much lesser degree, and typically would not interpret issues related to policy development.

PERFORMANCE

Each member is responsible for determining and assessing the performance of the facilitator or attendant providing services to the member. Job performance of a facilitator or attendant is primarily determined by the unique needs of the Council member being served. Based on a self-assessment, the member specifies the type(s) of assistance that will be expected of the facilitator and/or attendant. Expectations are to be in precise terms and must be documented in writing. Each expectation, or task, once clearly defined, must be included in a checklist of tasks.

The task checklist will aid in identifying and documenting specific areas the Council member needs help with. For example, if the Council member indicates the need for a facilitator, the specific task(s) are also to be identified. Examples are assistance with making transportation/travel arrangements, interpretation of agenda items, and/or

handling/managing funds. Similarly, a member may determine that he/she requires the aid of an attendant with three tasks: eating, bathing, and toileting. Further specificity may indicate that this member, for bathing, may require help with undressing and dressing, but not with washing, drying, or other remaining steps.

Additional information, worksheets, and sample checklists may be found in the Council's publication, "Facilitation: Purpose, Planning, and Practice." This publication may be accessed at: <http://www.scdd.ca.gov/res/docs/pdf/SSAN/Facilitation.pdf>

**ATTACHMENT A
STATE COUNCIL ON DEVELOPMENTAL DISABILITIES
FACILITATOR AND ATTENDANT SERVICES AND TRAVEL
REASONABLE AND REIMBURSABLE PAYMENTS**

SERVICES

When a non-agency member of the Council has determined that facilitator or attendant services are needed to assist them in performing his/her essential Council functions, the Council will authorize payment for facilitator or attendant services if those payments are reasonable under the State's reimbursement rules. For example, the following pay rates based on 2013 information compiled by the Department of Developmental Services have been determined to be reasonable and reimbursable:

<u>SERVICE</u>	<u>PAY RATE</u>
Facilitator	\$13.09 per hour
Attendant	\$13.46 per hour

The above pay rates are based on the mid-range monthly salaries of comparable state classifications. Each relevant salary was converted to an hourly rate and adjusted by 28.1 percent (the cost of state benefits) in order to recognize the self-employment cost to private vendors. Payment of these rates were limited to two hours before, during, and two hours after a Council related meeting.

Services Provided by Employees or Other Compensated Persons: If the facilitator or attendant is an employee of the Council, developmental center or regional center, or is already being compensated for the facilitation or attendant services, the Council will reimburse only for allowable travel related expenses.

Services Provided by Volunteers: If a member requires facilitation or attendant services and the facilitator or attendant is a volunteer, the council will authorize payment of travel related expenses for the volunteer.

TRAVEL

In accordance with PML 1986-001 entitled, "Travel Expenses of Non-State Employees," travel expenses of individuals providing facilitation or attendant services to a member may be reimbursed at rates equal to the rates allowed the member. Reimbursement for such travel expenses may be claimed on a travel expense claim which references the services provided and the name of the disabled member.

ATTACHMENT B
STATE COUNCIL ON DEVELOPMENTAL DISABILITIES
FACILITATOR SERVICES TASK CHECKLIST

The task checklist will be used in determining the reasonableness of costs for facilitator and/or attendant services used by the member.

This facilitator services task checklist is to aid in identifying and documenting specific areas the member needs assistance with to enable him/her to fully participate in Council related meetings.

Definition: Facilitation refers to a service wherein one person aids another to understand policy issues, to develop his/her own informed decisions regarding the issues, and to effectively express those decisions. A facilitator also assists with making transportation/travel arrangements, obtaining and/or managing funds required for attending Council related meetings, reviewing and interpreting agenda items, and providing support during meetings through interpretation of actions or discussions on agenda items.

In order to determine if the member requires the assistance of a facilitator, please indicate yes or no to the following list of Council related activities or functions:

1. Assistance is needed with the interpretation of policy related information, either written or oral, into a form that is more easily understood.
YES ___ NO ___
2. Assistance is needed in making travel and transportation arrangements to attend Council related meetings and related functions.
YES ___ NO ___
3. Assistance is needed in obtaining and/or managing funds required for taking part in Council related meetings.
YES ___ NO ___
4. Assistance is needed in the interpretation of agenda items prior to meetings.
YES ___ NO ___
5. Assistance and support is needed during meetings with the interpretation of actions or discussions of agenda items.
YES ___ NO ___

**ATTACHMENT C
STATE COUNCIL ON DEVELOPMENTAL DISABILITIES
ATTENDANT SERVICES TASK CHECKLIST**

The task checklist will be used in determining the reasonableness of costs for facilitator and/or attendant services used by the member.

This attendant services task checklist is to aid in identifying and documenting specific areas the member needs assistance with to enable him/her to fully participate in Council related meetings.

Definition: Attendant services refer to assistance from others which compensates for a person's inability to independently perform activities of daily living. Services may include assistance with personal maintenance and hygiene, mobility, and escort services.

In order to determine if the member requires the assistance of an attendant, please indicate yes or no to the following list of activities:

1. Mobility and escort services to and from meetings.
2. Activities of daily living (specify)
 - a. Dressing YES ___ NO ___
 - b. Bathing YES ___ NO ___
 - c. Eating YES ___ NO ___
 - d. Tilting YES ___ NO ___
 - e. Grooming YES ___ NO ___
 - f. Respirator equipment maintenance YES ___ NO ___
 - g. Other

3. Reading of materials YES ___ NO ___