

ARCA Standard – Remote and In-Person Planning Team Meetings

Focus Area and Scope of this Standard

- Trailer Bill Language ([AB 162](#)) was signed by Governor Newsom in July 2024. In the relevant portion, it allows remote planning team meetings (IPP/IFSP). New statute also requires in-person contact at least every twelve months for those with an IPP and every six months for those with an IFSP. This standard addresses those new allowances and expectations.
- This standard does not address case-by-case flexibilities that may be needed for specialty populations, such as youth in the child-welfare system or individuals who are justice-involved.

Definitions of Words Used in this Standard

1. **Planning Team Meeting:** A meeting to develop, evaluate, and/or revise an IPP or IFSP and includes the regional center service coordinator, person-served, and others, including family members, as appropriate.
2. **In-Person Meeting or Visit:** A face-to-face interaction between the regional center service coordinator and the person-served.

Background/Why this is Important

- This standard will support the consistent application of the remote allowance for planning team meetings as well as the requirement for in-person contact for those served by regional centers. Consistency in the availability of remote planning meetings and in-person visits rose to a level of significant attention resulting in high political focus during the 2024-25 Budget development process.

Standard

- Individuals served by a regional center or their authorized representative can request planning team meetings be held remotely. The regional center service coordinator may encourage in-person planning team meetings and highlight the benefits, including noting the law requires in-person interaction between the service coordinator and person-served. If, however, the individual or their authorized representative decides to hold the planning team meeting remotely, the regional center service coordinator will comply with this request.
- For those not seen by the service coordinator in-person in the last six months if served under an IFSP or twelve months if served under an IPP, the regional center service coordinator shall hold an in-person meeting or visit “at a time that is convenient for, and reflects the preference of, the” person-served or their authorized representative. This meeting may be held in any community setting. This standard will be applied consistently across populations served and will not target one over another. This expectation applies regardless of whether the individual is required to have an annual or triennial planning team meeting.

- Nothing in this standard requires the in-person meeting to take place in the individual’s home, although the regional center service coordinator may encourage in-home meetings and highlight the benefits, including the evaluation of service effectiveness in the natural environment.
- Article IX, Section 1, paragraph b of the contract with the state requires regional centers to have quarterly face-to-face contact with those living in licensed community care facilities, health facilities, supported living and independent living settings, and adult family homes. Contract specifies that the purpose of these contacts is “monitoring the health, safety and well-being of each individual, gathering information to assess the effectiveness of services provided to meet the individual’s needs and monitoring progress in meeting identified goals.”
- For some populations, having visitors in the family home may be less welcome than for others. If meetings are conducted in the family home, service coordinators are expected to demonstrate cultural humility.
- The beginning point for measurement of the six- or twelve-month timeline for the required visit shall be no earlier than July 1, 2024.
- Regional centers will establish data systems to consistently track the date of the most recent in-person planning team meeting or in-person meeting or visit for each person-served to support staff in carrying out these requirements.
- Consistent with WIC §4646(f)(2)(A) and Government Code §95020(c)(2)(A), inability to coordinate the required in-person meeting shall not delay the development of the IPP or IFSP or service authorization or delivery.
- Regional centers will provide training to their service coordination staff that is developed collaboratively and includes how to address those who are wary of or actively resist in-person meetings and the function of in-person meetings or other visits that do not coincide with IPP or IFSP development or review.

Related Legal Requirements

Other requirements that govern the administration of planning team meetings can be found in WIC §4646, §4646.5, and §4646.6 and Government Code §95020.

Indicators of Performance

- Data will be collected regarding the number of those who have not been seen in person in the past 6 or 12 months (whichever applies), whom they tend to be (*e.g.*, demographic factors, including age, gender, living arrangement, race/ethnicity, language), and the most common reasons for not meeting the required timelines for an in-person meeting.

Range

- It is expected specified data will be collected for 95% of those served by July 1, 2026 and then maintained on an ongoing basis.
- Once baseline data is collected, goals related to the reduction of the number of people not seen in-person within the specified timelines will be established.

Resources Available

- Through its Training and Information Group, ARCA will develop the standardized training elements to support regional centers' performance.
- ARCA staff will work with DDS staff to define required data elements for tracking through SANDIS and other case management systems.

Example

- Before the explicit flexibilities for remote planning team meetings that began in 2020 as a result of the pandemic, regional centers accommodated the needs of individuals served and their families struggling to schedule in-person planning team meetings. This was done by conducting the meeting telephonically or without the child or conserved adult served by the regional center present, which was followed-up with a separate in-person meeting or visitation. The function of that in-person meeting was the evaluation of the effectiveness of current services and/or assessment related to newly-requested services. The changes to the planning team meetings included in AB 162 largely enshrine in statute this prior practice.

Date Adopted by ARCA Board of Directors: October 18, 2024