

**Quarterly Council  
Meeting  
May 2 & 3, 2024  
DoubleTree Charlotte  
Airport,  
Charlotte, NC**



**NCCDD**

North Carolina Council on  
Developmental Disabilities



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# Hotel Information

**DoubleTree by Hilton Hotel Charlotte Airport**  
**2600 Yorkmont Rd.**  
**Charlotte, NC, 28208**  
**Phone: 704-357-9100**



# NCCDD

**North Carolina Council on  
Developmental Disabilities**





**NCCDD  
STAFF ON CALL**



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



# 2024 COUNCIL ON DEVELOPMENTAL DISABILITIES

## **EXECUTIVE COMMITTEE**

### **Bryan Dooley: Chair**

Jon D'Angelo: Vice-Chair  
Bethany Dawn Smith: Secretary  
Tony Hall: Chair, Financial Asset Development  
Charlrean Mapson: Chair, Community Living  
Marjorie Serralles-Russell: Chair, Policy Education  
Nessie Siler: Vice-Chair  
Donna Spears: Chair, Advocacy Development

## **APPOINTED POSITION/COUNTY**

Individual with DD-Forsyth  
Individual with DD-Wake  
Individual with DD-Pitt  
Individual with DD-Wake  
Parent-New Hanover  
Parent-Mecklenburg  
Individual with DD-Dare  
Individual with DD-Onslow

*Staff: Pam H. Dempsey, David Ingram, Talley Wells (Executive Director), Shar'ron Williams, Letha Young*

## **FINANCIAL ASSET DEVELOPMENT COMMITTEE**

### **Tony Hall, Chair**

Dawn Allen  
Katherine Boeck  
Representative Terry Brown  
Kelly Crosbie; Alternate: Ginger Yarbrough  
Carol Ann Hudgens, Ph.D.; Alternate: Dreama McCoy  
R.V. Kuser  
Rebecca Putnam, M.D.  
Nessie Siler  
Kathie Smith; Alternate: Kenny Gibbs  
Madhav Swaminathan, M.D.  
Sandra Terrell; Alternate: *Vacant*  
Carla West; Alternate: Amy Eaton

### **Individual with DD-Wake**

Public At Large-Stanly  
Individual with DD-Edgecombe  
Legislative Representative-Mecklenburg  
Agency: DHHS-MH/DD/SAS-Wake  
Agency: Dept. Public Instruction-Wake  
Individual with DD – Forsythe  
Sibling-Buncombe  
Individual with DD-Dare  
Agency: DHHS-Voc. Rehabilitation-Wake  
Parent-Durham  
Agency: DHHS-NC Medicaid-Wake  
Agency: DHHS-Social Services-Johnston

*Staff: Juanita Hooker*

## **COMMUNITY LIVING COMMITTEE**

### **Charlrean Mapson, D. Min., Chair**

Senator Sydney Batch  
Carol Ann Conway  
Rhonda Cox; Alternate: Judith Kirkman  
Jonathan D'Angelo  
Debra Farrington; Alternate: Deb Goda  
Joshua Gettinger, M.D.  
Brendon Hildreth  
Gary Junker, Ph.D.; Alternate: *Vacant*  
Ryan Rotundo  
Bethany Dawn Smith  
Dale Stephenson  
Peggy Terhune, Ph.D.

### **Parent-New Hanover**

Senate Representative-Wake  
Individual/Relative Institution-Orange  
Non-Profit Agency-Buncombe  
Individual with DD-Carteret  
Agency: DHHS  
Parent-Buncombe  
Individual with DD-Craven  
Dept. of Adult Correction-Orange  
Sibling-Buncombe  
Individual with DD-Pitt  
Parent-Wake  
Local Non-Governmental Agency-Randolph

*Staff: Philip Woodward*

## **ADVOCACY DEVELOPMENT COMMITTEE**

### **Donna Spears, Chair**

Keith B. Carney  
Yvonne Copeland; Alternate: Danielle Matula  
Myron Michelle Gavin  
Representative Zach Hawkins  
Aldea LaParr  
Virginia Knowlton Marcus  
Kayla McMillan  
William Miller  
Tocarra E. Osborne  
Karey Perez; Alternate: Sarah Smith  
Joe Piven, M.D.; Alternate: Anna Ward  
Marjorie Serralles-Russell

*Staff: Melissa Swartz*

## **PUBLIC POLICY EDUCATION COMMITTEE**

*Meets Monthly on 2<sup>nd</sup> Thursday(s) 10:30AM-12:00PM*

### **Marjorie Serralles-Russell, Chair**

Representative Terry Brown  
Carol Ann Conway  
Yvonne Copeland; Alternate: Danielle Matula  
Kelly Crosbie (DMH/DD/SAS); Alternate: Ginger Yarbrough  
Jonathan D'Angelo  
Bryan Dooley  
Kay McMillan  
Rebecca Putnam, M.D.  
Ryan Rotundo  
Nessie Siler  
Bethany Dawn Smith  
Donna Spears

*Staff: Chris Hendricks Contractor: Jill Hinton, Ph.D.*

## **STAFF**

### **Talley Wells**

Pam Hunter Dempsey  
Chris Hendricks  
Juanita Hooker  
David Ingram  
Irlanda Ruiz  
La'Quadia Smith  
Melissa Swartz  
Shar'ron Williams  
Philip Woodward  
Letha Young  
*Vacant*

### **Individual with DD-Onslow**

Parent-Pender  
Agency: DHHS-W/C Health-Wake  
Parent-Craven  
Parent-Durham  
Individual with DD-Wayne  
Agency: Disability Rights NC-Wake  
Individual with DD-Wake  
Individual with DD-Davidson  
Parent-Bladen  
Agency: DHHS-Aging & Adult Services-Wake  
Agency: Carolina Institute on DD-Orange  
Parent-Mecklenburg

### **Parent-Mecklenburg**

Legislative Representative-Mecklenburg  
Individual/Relative Institution-Orange  
Agency: DHHS-W/C Health-Wake  
Agency: DHHS-MH/DD/SAS-Wake  
Individual with DD-Carteret  
Individual with DD-Forsyth  
Individual with DD-Wake  
Sibling-Buncombe  
Sibling-Buncombe  
Individual with DD-Dare  
Individual with DD-Pitt  
Individual with DD-Onslow

### **Executive Director**

Systems Change Manager  
Public Policy Education Coordinator  
Systems Change Manager  
Director of Operations  
Hispanic Disability Advocate  
Business Services Coordinator  
Systems Change Manager  
Business Officer  
Systems Change Manager  
Assistant to the Executive Director  
*Administrative Specialist I*



**Meeting: NC Council on Developmental Disabilities  
Location: Doubletree Charlotte, NC/ ZoomGov**

**DRAFT  
AGENDA**

**THURSDAY, MAY 2, 2024**

Join ZoomGov Meeting: <https://www.zoomgov.com/j/1610918623?pwd=Q0ljNVFkL3RXVjhIYXdScW9paGJVZz09>

**\*Breakfast (Provided) 7:45-9:00 AM**

**In-Person - Ballroom**

8:30 – 8:45 AM **WELCOME & APPRECIATION OF OUTGOING MEMBERS**  
.....**Bryan Dooley, NCCDD Chair**

8:45 – 9:45 AM **INITIATIVE UPDATES & FUNDING DISCUSSIONS/REQUESTS**  
~Financial Asset Development Initiative/Investment Opportunities  
.....**Tony Hall, Chair of Financial Asset Development Committee**

~Community Living Initiative/Investment Opportunities  
.....**Charlean Mapson, D. Min., Chair of Community Living Committee**

~Advocacy Development Initiative/Investment Opportunities  
~Bridging Pathways I/DD Peer Mentoring Initiative Update  
.....**Donna Spears, Chair of Advocacy Development Committee**

~Council Budget: SFY 2024-2025  
~In-House Initiatives: SFY 2024-2025  
.....**Shar’ron Williams & David Ingram**

9:45 – 10:15 AM .....**BREAK**

10:15 – 11:15 AM **PUBLIC POLICY EDUCATION UPDATE**.....**Jill Hinton, NCCDD Policy Analyst, and Chris Hendricks, NCCDD Public Policy Education Coordinator**

11:15 – 11:30 AM **DMH/DD/SUS Update**.....**Ginger Yarbrough, DMH/DD/SUS I/DD, TBI, & Olmstead Section Chief**

11:30 – 12:00 PM **LUNCH SERVICE BEGINS** \*Lunch (Provided) 11:30-1:00 PM

12:00 – 1:00 PM **LUNCH SESSION – ALTERNATE RESPONSE/PEER SUPPORT**.....**Cherene Caraco, Promise Resource Network CEO**

1:00 – 1:30 PM .....**BREAK**

1:30 – 3:45 PM **COMMITTEE MEETINGS**  
Advocacy Development.....Salon A  
Community Living.....Salon B  
Financial Asset Development.....Salon C

3:45 – 6:30 PM **DINNER ON YOUR OWN**

6:30 – 7:45 PM **I/DD TOWN HALL**...**Kelly Crosbie, NC DHHS Director of DMH/DD/SUS, Rep. John Bradford, Rep. Terry Brown, Ginger Yarbrough, NC DMH/DD/SUS, & More**

**In-Person Registration:** <https://lp.constantcontactpages.com/ev/reg/k6jxd65>

**Virtual Registration:** <https://lp.constantcontactpages.com/ev/reg/jz2vaz2>



**Meeting: NC Council on Developmental Disabilities  
Location: Doubletree Charlotte, NC/ ZoomGov**

**DRAFT  
AGENDA  
FRIDAY, MAY 3, 2024**

Join ZoomGov Meeting: <https://www.zoomgov.com/j/1616316772?pwd=NjNldWtTZmtudENMdnJTVkVWTVZZdz09>

**\*Breakfast (Provided) 7:30 – 8:30 AM**

**In-Person - Ballroom**

- 8:30 – 8:45 AM **WELCOME, CONFLICT OF INTEREST & SAFETY AND PREPAREDNESS**.....Bryan Dooley
- 8:45 – 8:55 AM **ROLL CALL**.....Bethany Smith
- 8:55 – 9:00 AM **APPROVAL OF MINUTES**.....Bethany Smith
- 9:00 – 9:15 AM **DIRECTOR’S REPORT & APPRECIATION**.....Talley Wells
- 9:15 – 9:35 AM **NC DHHS UPDATE**.....LaCosta Parker, NC Medicaid
- 9:35 – 9:40 AM **FINANCIAL REPORT**.....Bryan Dooley
- 9:40 – 10:00 AM **LEGISLATIVE UPDATE**.....Representatives Brown and Hawkins/Senator Batch
- 10:00 – 10:15AM **PUBLIC COMMENT\***.....Bryan Dooley
- 10:15 – 10:45 AM ..... **BREAK**
- 10:45 – 11:45 AM **COMMITTEE REPORTS**
  - Executive Committee.....Bryan Dooley
  - Advocacy Development..... Donna Spears
  - Community Living.....Charlrean Mapson, D. Min.
  - Financial Asset Development.....Tony Hall
  - Public Policy Education Committee.....Marjorie Serralles-Russell
- 11:45 – 12:30 PM **IDD NETWORK PARTNERS & STATE AGENCY UPDATES**
  - ~Disability Rights NC Update.....Virginia Knowlton Marcus/Susan McLean
  - ~Carolina Institute for Developmental Disabilities Update.....Joe Piven/Anna Ward
  - ~NC Division of Vocational Rehabilitation Services.....Kathie Smith/Kenny Gibbs
  - ~NC DMH/DD/SUS Update.....Kelly Crosbie/Ginger Yarbrough
- 12:30 – 12:40 PM **NEW BUSINESS**
- 12:40 – 12:45 PM **OLD BUSINESS**
- 1:00 PM **ADJOURN**

# Council Minutes



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



**DRAFT**

## **NC COUNCIL ON DEVELOPMENTAL DISABILITIES**

**www.nccdd.org**

### **Quarterly Council Meeting Minutes Virtually**

**February 9, 2024**

**MEMBERS PRESENT:** Dawn Allen, Katherine Boeck, Carol Ann Conway, Danielle Matula (for Yvonne Copeland), Kelly Crosbie, Judith Kirkman (for Rhonda Cox), Bryan Dooley, Jonathan D’Angelo, Debra Farrington, Myron Gavin, Joshua Gettinger, Tony Hall, Rep. Zack Hawkins, Brendon Hildreth, Carol Ann Hudgens, Gary Junker, Virginia Knowlton Marcus, R.V. Kuser, Aldea LaParr, Charlrean Mapson, Kay McMillian, Will Miller, Tocarra Osborne, Karey Perez, Ryan Rotundo, Anna Ward (for Joseph Piven), Rebecca Putnam, Marjorie Serralles-Russell, Nessie Siler, Bethany Smith, Kathie Smith, Donna Spears, Madhav Swaminathan, Peggy Terhune, Sandra Terrell, Carla West, Ginger Yarbrough

**MEMBERS ABSENT:** Senator Sydney Batch, Rep. Terry Brown, Jr., Dale Stephenson

**STAFF PRESENT:** Pam Hunter Dempsey, Cora Gibson, Chris Hendricks, David Ingram, Irlanda Ruiz, La’Quadia Smith, Melissa Swartz, Talley Wells, Philip Woodward, Letha Young

**CONTRACTORS/GUESTS PRESENT:** Racine Allen, Normal Cervo, Caryn Cook, Corye Dunn, Sarah Ferguson, Beth Field, S. Gales, Deb Goda, Tara Heasley, Jill Hinton, Paula King, Secretary Kody Kinsley, Betsy MacMichael, Dreama McCoy, Tara Muller, David Owen, LaCosta Parker, Cheryl Powell, Pablo Puente, Sarah Richardson, Amber Tillman, Felicia Williams Brown, 23 East Group, Captioners

#### **WELCOME AND ATTENDANCE**

Bryan Dooley, NCCDD-Chair, welcomed the members. Bryan asked any Council member with a potential conflict of interest regarding items on the agenda to identify the specific conflict for documentation in the minutes and recuse, as necessary. He thanked the members for their participation on Thursday.

Bethany Smith conducted the roll call.

#### **APPROVAL OF COUNCIL MINUTES**

Bethany Smith asked for approval of the November Council meeting minutes. A copy of the minutes had previously been made available to Council members.

**MOTION:** Marjorie Serralles-Russell made a motion to approve the November 2023 minutes. Peggy Terhune seconded the motion. The motion was approved by unanimous vote.

#### **DIRECTOR’S REPORT**

Talley Wells, Executive Director of NCCDD welcomed Juanita Hooker, the new system change manager, and introduced the two new council members, RV Kuser and Madhav Swaminathan. Talley also provided an update of the Council’s activities since the November 2023 Council meeting. Talley gave updates on the following:

## Since November Council Meeting

- Presentations/Conferences
  - i2i Competitive Integrated Employment Half-Day Session
  - NADD Conference – Reentry Presentation
  - Southern AHEC Keynote Speech
- Taskforces
  - NC Caregiver Council – Report on DSPs, Nursing, and Behavioral Health Workers Issued January 2024
  - NC AHEC – DSP Certification Report Issued January 2024
  - All Ages/All Stages – Co-Leadership of Supporting Older Adults Working Group
- Federal Reporting Completed December 2023
- Peer Mentor Partnership with VR and New Contract Starting
- ALP-NC New Contract/Working through New Copyright & Ownership Questions
- Discussions with Meet the Need NC and Supported Living Guidebook on Next Steps
- Community Living Mini-Grants Starting
- Work on potential revisions to state NCCDD statute.

## Upcoming Council Activities and Events

- February 21<sup>st</sup> Public Benefits & Employment Webinar
- March DD Awareness Events
- March Release of *Unmet* Film for Streaming
- March 22<sup>nd</sup> Unmet Needs Film in Spanish in Charlotte
- DRNC Conference May 1<sup>st</sup> (Raleigh)
- May Council Meeting in Charlotte May 1<sup>st</sup> through 3<sup>rd</sup>
  - I/DD Townhall May 2<sup>nd</sup> Evening
- Potential Day at Capitol in May
- National APSE Conference June
- NADD Conference in July

## I/DD MEDICAID UPDATE

LaCosta Parker, IDD Program Manager, first thanked Talley for allowing her to introduce the Behavioral Health team to the Council. LaCosta's brought along two team members and they were Tara Heasley and Racine Allen. LaCosta also thanked the team's predecessors, Deb Goda, Michelle Merritt, and Kenneth Bausell for their help during the transition. LaCosta gave a brief overview of the Behavioral Health IDD/TBI. She talked about the 1915 (c) HCBS Innovations Waiver, the 1915(c) HCBS Traumatic Brain Injury Waiver, the research-based behavioral health treatment for autism spectrum disorder and the 1915(i) SPA (IDD/TBI Service Definitions).

## FINANCIAL REPORT

Bryan Dooley gave a brief report on the financial status of the Council. A copy of the report had previously been made available in advance of the Council Meeting.

## LEGISLATIVE UPDATE

Representative Zack Hawkins gave a brief legislative update sharing information on the short session. Rep. Hawkins shared that council should try to meet twice a month with the representatives. Finally, Representative Hawkins stated, "I am a parent member of this group and I just happen to be a legislator, but

we are so glad to join you and be with you in this life and I believe that we are going to win it for a lot of people. We need [NCCDD] work.”

## **PUBLIC COMMENT**

Kay McMillian shared information about the NC Youth Leadership Forum coming up on July 20<sup>th</sup> through July 24<sup>th</sup> at NC State. Kay stated that this is an opportunity for delegates to learn about the Disability Rights movement and have a lot of fun. And NC Youth Lead believes it will be life-changing for the delegates to be away from home for the first time.

Cheryl Powell recommended that the council form an alumni council or committee to keep former members involved and up to date with the activities of the Council.

Carol Ann Conway expressed concerns about the potential lack of services/supports available if an individual has a medical emergency while traveling out of state for a conference, vacation, funeral, etc.

## **NC DHHS UPATE**

Secretary Kody Kinsley gave a brief update on some of DHHS’ key activities since Secretary Kinsley’s last visit with the Council. He also allowed time for questions and/or discussion topics. Secretary Kinsley thanked the council for allowing him to spend time sharing this information during the council meeting.

## **COMMITTEE REPORTS**

Bryan Dooley requested the presentation of committee reports. Please refer to the committee minutes for a detailed description of each committee’s work.

## **EXECUTIVE COMMITTEE**

The Executive Committee members met on August 21, September 18, and October 16, 2023. Copies of the minutes were made available to Council members and Bryan Dooley asked members to review the minutes and reminded council members that the minutes were also posted on the NCCDD website.

## **FINANCIAL ASSET DEVELOPMENT COMMITTEE**

Nessie Siler, Vice Chair, presented the Financial Asset Development Committee report. She thanked all committee members and staff and gave a brief update on the discussions from Thursday’s meeting, including the initiative updates that were presented to the committee.

## **COMMUNITY LIVING COMMITTEE**

Dr. Charlrean Mapson, D. Min., Chair, presented the Community Living Committee report. She thanked all committee members and staff and gave a brief update on the discussions from Thursday’s meeting, including initiative updates that were presented to the committee.

## **ADVOCACY DEVELOPMENT COMMITTEE**

Committee Chair Donna Spears presented the Advocacy Development Committee report. She thanked all committee members and staff and gave a brief update on the discussions from Thursday’s meeting, including initiative updates that were presented to the committee.

## **PUBLIC POLICY EDUCATION COMMITTEE**

Committee Chair Marjorie Serralles-Russell presented the Public Policy Education Committee report. She gave a brief update on the committee's activities and on the discussions from their last meeting.

## **DD NETWORK PARTNER UPDATES**

Virginia Knowlton Marcus shares an update DRNC activities through a vocal video. The video can be reviewed again upon request.

Kathie Trotter of the NC Vocational Rehabilitations Service (VRS) gave a brief update of VRS's activities through a vocal video. The video can be viewed again upon request.

Anna Ward of the Carolina Institute for Developmental Disabilities (CIDD) gave a brief update of the CIDD's activities through a vocal video. The video can be viewed again upon request.

## **NEW BUSINESS**

No new business.

## **OLD BUSINESS**

No old business.

## **ADJOURN**

**MOTION:** Bryan Dooley, Chair, asked for a motion to adjourn the meeting. Virginia Knowlton Marcus made a motion to adjourn the February 2024 Council meeting. Katherine Boeck seconded the motion. The motion was approved by unanimous vote.

# Executive Committee



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



# NC Council on Developmental Disabilities

**FINAL**

## Executive Committee Minutes

Date: Tuesday, January 16, 2024

Time: 10:30AM – 12:30PM

**Members Present:** Bryan Dooley (Chair), Jon D’Angelo, Marjorie Serralles-Russell, Nessie Siler, Bethany Smith, Donna Spears

**Members Absent:** Tony Hall, Charlrean Mapson, D. Min.

**Staff Present:** Pam Dempsey, Chris Hendricks, David Ingram, Irlanda Ruiz, La’Quadia Smith, Melissa Swartz, Talley Wells, Shar’ron Williams, Philip Woodward, Letha Young

**Guests/Council members Present:** None

### I. CALL TO ORDER

Bryan Dooley called the meeting to order and welcomed the members.

### II. APPROVAL OF MINUTES

**MOTION:** Marjorie Serralles-Russell made a motion to approve the draft minutes for the December 18, 2023, Executive Committee meeting.

Jon D’Angelo seconded the motion. The motion was approved by unanimous vote.

### III. ED Update

Talley Wells provided updates and discussed the following:

- Data Initiative – **VOTE**

DATA INITIATIVE MOTION: Bethany Smith made a motion to approve the Data Proposal, as approved at the November Council meeting and providing Sole-Source Funding to Michelle

Franklin, Ph.D. on her own, or through an LLC or similar entity, or through Duke University to engage in the Data Initiative in the amount of \$25,000 in NCCDD funds, with non-federal matching funds waived for an anticipated period of up to six (6) months, starting no sooner than January 16, 2024 and ending no later than September 30, 2024.

*[November Council Meeting Motion]Direct the North Carolina Council on Developmental Disabilities (NCCDD) to draft a short-term, six-month, \$25,000 data initiative through either a Request for Application or, if necessary and appropriate, a Sole Source. The Public Policy Committee recommends that NCCDD, after drafting the Data Initiative Proposal, discuss it with leaders at DHHS, particularly at the Division of Health Benefits and the Division of Mental Health, Developmental Disabilities, and Substance Use Services. NCCDD then would bring the proposal to the Executive Committee for final approval. The anticipated end date of the Data Initiative Proposal is September 30, 2024, though those details are requested to be outlined in the Data Initiative Proposal that receives ultimate review through the Executive Committee.*

Marjorie Serralles-Russell seconded the motion. The motion was approved by unanimous vote.

- Charlotte Meeting Evening Activity
- Copyright discussion/ALP – **VOTE**

IP CONSULTATION MOTION: Jon D’Angelo made a motion to approve NCCDD to enter into a Memorandum of Understanding (MOU) with Community Bridges Consulting Group (CBCG) agreeing to negotiate ‘in good faith’ some type of shared ownership, creative commons license, or other potentially perpetual licensing of Intellectual Property (IP) related to the Ability Leadership Project of North Carolina (ALP-NC) Initiative curriculum and also Approve NCCDD to seek IP legal consultation for up to \$10,000 through NC DHHS and/or external to NC DHHS regarding shared ownership or Creative Commons Licensing in the context of NCCDD’s State and Federal requirements and the interests of the Council and I/DD community.

Marjorie Serralles-Russell seconded the motion. The motion was approved by unanimous vote.

- Federal Budget Update/Spending

#### **IV. Financial Report and Expenses/Match Update**

Shar'ron Williams provided the financial update.

#### **V. Conference Funding – VOTE**

##### CONFERENCE FUNDING MOTION:

Marjorie Serralles-Russell made a motion to approve using In-House Conference Funds to support the North Carolina state chapter of the National Association of People Supporting Employment First (NC APSE)'s *30 Years of Employment for All* event on March 13-15, 2024 at the Courtyard by Marriott Carolina Beach at Carolina Beach, NC for up to \$2,500 in Honorarium (i.e., speaker's fees).

Nessie Siler seconded the motion. The motion was approved by unanimous vote.

#### **VI. Financial Report and Expenses/Match Update**

Shar'ron Williams provided the financial update.

#### **VII. Council Meeting/Member Survey Review**

The Executive Committee reviewed and discussed the November Council Meeting Member surveys.

#### **VI. ADJOURN**

**MOTION:** Donna Spears made a motion to adjourn the Executive Committee meeting.

Bryan Dooley seconded the motion. The motion was approved by unanimous vote.

Bryan Dooley adjourned the meeting at 12:03PM.

# NC Council on Developmental Disabilities

**FINAL**

## Executive Committee Minutes

Date: Monday, February 26, 2024

Time: 10:30AM – 12:30PM

**Members Present:** Bryan Dooley (Chair), Jon D'Angelo, Marjorie Serralles-Russell, Nessie Siler and Donna Spears

**Members Absent:** Tony Hall, Charlrean Mapson, D. Min., Bethany Smith

**Staff Present:** Pam Dempsey, Chris Hendricks, Juanita Hooker, David Ingram, Irlanda Ruiz, La'Quadia Smith, Melissa Swartz, Talley Wells, Shar'ron Williams, Philip Woodward, Letha Young

**Guests/Council members Present:** Mike Lovano

### I. CALL TO ORDER

Bryan Dooley called the meeting to order and welcomed the members.

### II. APPROVAL OF MINUTES

**MOTION:** Jon D'Angelo made a motion to approve the draft minutes for the January 16, 2024, Executive Committee meeting.

Marjorie Serralles-Russell seconded the motion. The motion was approved by unanimous vote.

### III. ED Update

Talley Wells provided updates, discussion, and motions were entertained for the following:

#### a. Peer Mentoring

**MOTION** – Marjorie Serralles-Russell made a motion to provide Community Bridges Consulting Group (CBCG) a No-Cost Extension on the I/DD Peer Mentor initiative entitled 'The Peer Mentor Training Program (PMTP)', extending the duration from

“up to 6-months” as outlined in the May 2023 NCCDD approved motion to “up to 9-months” to account for the additional time and energies it took to expand the work of this initiative to include NC DVRS and negotiate an agreed-upon Memorandum of Understanding (MOU) with NC DVRS, NCCDD, and CBCG.

Nessie Siler seconded the motion. The motion was approved by unanimous vote.

b. National APSE Proposal

**MOTION** – Donna Spears made a motion to authorize the NCCDD in alignment with the National APSE Proposal e-mailed in advance of the February 26, 2024 Executive Committee Meeting to provide up to \$20,000 to support the National APSE Conference occurring in June 2024 in Charlotte, NC. This funding would include up to \$10,000 in additional funding for the In-House Conference Funds Initiative funding to reimburse National APSE for accommodations for people with intellectual, developmental, and other disabilities. This funding would also include up to \$10,000 in additional funding for the NCCDD In-House Jean Wolff Rossi for Participant Involvement Fund for the Council to provide funding for people with intellectual or other developmental disabilities (I/DD) or Family Members to attend the conference. The EC also authorizes NCCDD’s Executive Director to increase the Rossi Fund’s individual, family, and household in-state event limits from \$600 to up to \$1,200 for the 2024 National APSE Conference.

Jon D’Angelo seconded the motion. The motion was approved by unanimous vote.

c. Proactive Approaches to Justice RFA

**MOTION** – Donna Spears made a motion to approve the NCCDD to release a Request for Applications (RFA) for a *Proactive Approaches to Justice for People with I/DD* initiative in March, 2024, and in the amount of up to \$110,000.00 with required minimum of 25% non-federal matching funds (e.g., \$36,667.00) each year, for a period of up to three years, with Year 1 (of 3) to begin October 1, 2024 and end September 30, 2025. The RFA response(s) will be due in May 2024 and will

include the updated measurable outcomes included in the Proactive Approaches to Justice for People with I/DD RFA Draft 2 e-mailed to the Executive Committee (EC) in advance of the February 26, 2024 EC meeting. The EC authorizes NCCDD staff to amend the 1) RFA release date, 2) RFA due date, 3) RFA deliverables, and 4) RFA details, as necessary, so long as the RFA retains the intent of its presently included deliverables, and the changes serve to enhance the outcome of and/or interest in the RFA.

*November 2023 Council Meeting Motion:*

*Authorize NCCDD to release a Request for Applications (RFA) for a three-year Proactive Approaches to Justice for People with I/DD initiative. NCCDD's staff, with final approval from the Executive Committee, will have the authority to determine the following information to add to the draft RFA that the Community Living Committee received on November 3<sup>rd</sup>:*

- *The release date and due date;*
- *The funding amount with a required 25% minimum non-federal match required;*
- *Add measurable outcomes beyond numbers trained and any language relevant to this;*
- *Information regarding the RFA process, itself, such as clarification within the RFA as to what constitutes a completed application in order to ensure that applicants will submit complete, rather than incomplete, applications.*

Nessie Siler seconded the motion. The motion was approved by unanimous vote.

d. **Executive Session** -- Confidential Vote/Motion in relation to a Request for Proposal *in silent period*.

e. CRM SOLUTION COSTS

**MOTION** – Marjorie Serralles-Russell made a motion to approve the NCCDD to secure through NC DHHS and NC Office of Procurement, Grants, and Contracts authorized methods, a Customer Relationship Management solution or set of solutions that includes NC Legislative Bill and Committee tracking information and other methodologies to provide NCCDD's NC Advocacy Leaders Network an NCCDD owned and retained solution for use in its initiative's engagement, legislative education, other deliverables, and follow-up. The NCCDD is authorized to use up to \$15,000 per year to secure

this/these solution(s), provided that NCCDD will retain its data at the end of the contract period(s) and will not need additional funding for archiving.

Donna Spears seconded the motion. The motion was approved by unanimous vote.

#### IV. Conference Funding – MOTIONS

- Disability Rights North Carolina (DRNC)

**MOTION:** Jon D’Angelo made a motion to approve using In-House Conference Funds to support the Disability Rights North Carolina event on May 1, 2024 at the McKimmon Center in Raleigh, NC, for up to [\$3,000] in Speaker Fees [\$500] and Meeting Space [\$2,500] costs.

Marjorie Serralles-Russell seconded the motion. The motion was approved by unanimous vote.

- Triangle Orange County Disability Awareness Council (Triangle DAC)

**MOTION:** Nessie Siler made a motion to approve using In-House Conference Funds to support the Triangle DAC ‘Affordable and Accessible Housing, Know Your Rights!’ event on March 8<sup>th</sup> and March 15<sup>th</sup> the Europa Center in Chapel Hill, NC for up to [\$1,300] in Speaker Fees [\$500] and Accommodation-Related [\$800] Costs.

Donna Spears seconded the motion. The motion was approved by unanimous vote.

- In-House I/DD Speaker, Advisor, and Advocate Fund

**MOTION:** Jon D’Angelo made a motion to within the of component of *relationship development between and among self-advocates* of the NCCDD Self-Advocate Discussion Series initiative, approve NCCDD to utilize the Council’s In-House I/DD Speaker, Advisor, and Advocate Fund in the amount of \$500.00

for speaker fee to Katherine McLaughlin, CEO/Lead Trainer of Elevatus Training to present an abbreviated training and facilitate an audience question and answer session on the topic of relationships on May 15, 2024. The 90-minute virtual event will offer a broad overview on relationship building, maintenance, and safety, then focus on relationships going from friendship to a partnership.

**NOTE:** This is similar to an extremely well-received event that received \$500 in I/DD Speaker & Advocate Funds in May 2023. I/DD Speaker Advisor and Advocate Fund Balance (\$5,000 of \$5,000 July 1, 2023 - June 30, 2024)

Donna Spears seconded the motion. The motion was approved by unanimous vote.

## **V. Council Meeting/Member Survey Review**

The Executive Committee reviewed the November Council Meeting Member surveys. David Ingram then reviewed the draft agenda for the upcoming May Council meeting that is scheduled to be held in Charlotte, NC.

## **VI. ADJOURN**

**MOTION:** Donna Spears made a motion to adjourn the February 26, 2024 Executive Committee meeting.

Nessie Siler seconded the motion. The motion was approved by unanimous vote.

Bryan Dooley adjourned the meeting at 12:33PM.

# NC Council on Developmental Disabilities

**FINAL**

## Executive Committee Minutes

Date: Monday, March 18, 2024

Time: 10:30AM – 12:30PM

**Members Present:** Jon D’Angelo, Charlrean Mapson, D. Min., Marjorie Serralles-Russell, Nessie Siler, Bethany Smith, Donna Spears

**Members Absent:** Bryan Dooley (Chair), Tony Hall

**Staff Present:** Pam Dempsey, Chris Hendricks, Juanita Hooker, David Ingram, Irlanda Ruiz, La’Quadia Smith, Talley Wells, Shar’ron Williams, Philip Woodward, Letha Young

### **Guests/Council members Present:**

#### **I. CALL TO ORDER**

Jon D’Angelo and Nessie Siler called the meeting to order and welcomed the members.

#### **II. APPROVAL OF MINUTES**

**MOTION:** Donna Spears made a motion to approve the draft minutes for the February 26, 2024, Executive Committee meeting.

Jon D’Angelo seconded the motion. The motion was approved by unanimous vote.

#### **III. ED Update**

Talley Wells provided updates, discussion, and motions were entertained for the following:

- a. Upcoming Outreach Events
- b. Update on Public Comments

c. Media Relations Program

**MOTION** – Marjorie Serralles-Russell made the motion to approve NCCDD Staff to both extend and increase the funding of the NCCDD Media Relations Program related motion, from ending on March 31, 2024 to instead end no later than June 30, 2024 and from \$180,000 annually, with 25% minimum non-federal matching funds, to \$200,000 annually prorated for the new period of time, with a required minimum of 25% non-federal matching funds (\$66,667).

Jon D'Angelo seconded the motion. The motion was approved by unanimous vote.

d. **Supported Living Guidebook**

**MOTION** – Marjorie Serralles-Russell made a motion to authorize NCCDD to enter into a sole-source contract for up to \$20,000.00 of FFY 2024 funds with FIRSTwnc to update and complete the Supported Living: A How-to Guidebook initiative's efforts on the Supported Living Guidebook, its companion website, and related videos. NCCDD would like to contract with FIRSTwnc through sole source funding for the following reasons:

- FIRSTwnc is one of the only providers of Supported Living for individuals with I/DD at all three levels (Levels 1, 2, and 3) in western North Carolina. In fact, three of the individuals that appear in videos on the Supported Living Guidebook website are individuals receiving services from FIRSTwnc.
- FIRSTwnc was highly ranked in its initial application to do this work when NCCDD released the Request for Applications (RFA) for this initiative, and, furthermore remained involved and invested in this work throughout the initial contract.
- The Supported Living: A How-to Guidebook initiative involved significant work and efforts across numerous deliverables and this work is more narrow in scope, funding, and effort than would normally be included in an RFA, with immediate action needed to achieve the

complete the prior initiative's desired outcomes in advance of 2025.

- Janet Price-Ferrell, Executive Director of FIRSTwnc, has been participating in the Supported Living Level 2 & 3 Action Team meetings and the quarterly Stakeholders meetings. Janet brings a unique and high level of system knowledge as both a parent of an individual who uses Supported Living and as a provider of Supported Living services.

NCCDD will negotiate the exact amount of funding to complete this initiative with FIRSTwnc. FIRSTwnc will be recommended to utilize the website vendor, Refocus Information Technology, through their quote of approximately \$1,100.00 to complete additional work to the Guidebook that NCCDD staff have identified. FIRSTwnc will also be recommended to collaborate with NCCDD to use the videographer, FIASCO Pictures, to complete one longer how-to video and three short social media clips. The rest of the funds will be used to support FIRSTwnc staff time to update the Guidebook and possibly provide subject matter updates or determine additional website and video needs. FIRSTwnc will have until September 30, 2024, to complete this work.

Dr. Charlrean Mapson seconded the motion. Discussion ensued. The motion was approved by unanimous vote.

#### **IV. Financial Report and Expenses/Match Update**

Shar'ron Williams provided the financial update.

#### **V. Performance Evaluation for Executive Director**

David Ingram reviewed the sample survey that was previously sent to the EC Members. A discussion ensued. It was decided that edits would be made and the survey will be sent out again for review.

## **VI. Conference Funding Request**

Koinonia Christian Center Church Ministries' Differently Abled Fun Fair (DAFF)

**MOTION:** Jon D'Angelo made a motion to approve using In-House Conference Funds to support the Koinonia Christian Center Church Ministries' Differently Abled Fun Fair (DAFF) event on May 18, 2024 at the Greenville Convention Center in Greenville, NC for up to \$3,000 (for Meeting Space Costs).

Donna Spears seconded the motion. The motion was approved by unanimous vote.

## **VII. Council Meeting/Member Survey Review**

David Ingram reviewed the draft agenda for the upcoming May Council meeting that is scheduled to be held in Charlotte, NC.

## **VI. ADJOURN**

**MOTION:** Jon D'Angelo made a motion to adjourn the March 18, 2024 Executive Committee meeting.

Marjorie Serralles-Russell seconded the motion. The motion was approved by unanimous vote.

Jon D'Angelo adjourned the meeting at 12:00PM.

# Advocacy Development Committee



**NCCDD**

North Carolina Council on  
Developmental Disabilities



# North Carolina Council on Developmental Disabilities

**Draft**

## Advocacy Development Committee Agenda

Thursday, May 2, 2024

1:30 PM – 3:45 PM

Location: Doubletree Charlotte Airport

Room: Salon A

Virtual Meeting Link: <https://www.zoomgov.com/j/1604818992?pwd=YIA4UEZ0c3lqVUpoOGhRQ041NFdsdz09>

Meeting ID: 160 481 8992

**1:30 p.m. – 1:35 p.m.**                      **Welcome/Approval of Feb. Minutes**                      *Donna Spears, Chair*  
5 minutes

**1:35 p.m. – 2:45 p.m.**                      **Initiatives Updates**

- 20 minutes (1:55)                      • ALP-NC (CBCG)                      *Kelly Woodall, Co-Coordinator*
- 15 minutes (2:10)                      • Peer Mentor Training                      *Kelly Friedlander, CEO CBCG*
- 15 minutes (2:25)                      • NC Advocacy Leaders Network                      *Dr. Victoria Nneji, CEO Akalaka co.*
- 10 Minutes (2:35)                      • Self-Advocate Discussion Series                      *Chris Hendricks, NCCDD Staff*
- 10 minutes (2:45)                      • Hispanic Disability Advocate                      *Irlanda Ruiz, NCCDD Staff*

**2:45 p.m. – 3:00 p.m.**                      **Break**  
15 minutes

**3:00 p.m. – 3:10 p.m.**                      **Fiscal Report**                      *Shar'ron Williams, NCCDD Staff*  
10 minutes

**3:10 p.m. – 3:30 p.m.**                      **Wrap Up and Reminders**                      *Donna Spears, Chair*  
20 Minutes

- Announcements
- Reminder: Next Council meeting – August 8 & 9, 2024 (Hilton Garden Inn Cary)

### ADVOCACY DEVELOPMENT COMMITTEE

**Donna Spears, Chair**

Keith B. Carney

Yvonne Copeland; Alternate: Danielle Matula

Myron Michelle Gavin

Representative Zach Hawkins

Aldea LaParr

Virginia Knowlton Marcus

Kayla McMillan

William Miller

Tocarra E. Osborne

Karey Perez; Alternate: Sarah Smith

Joe Piven, M.D.; Alternate: Anna Ward

Marjorie Serralles-Russell

### Individual with DD-Onslow

Parent-Pender

Agency: DHHS-W/C Health-Wake

Parent-Craven

Parent-Durham

Individual with DD-Wayne

Agency: Disability Rights NC-Wake

Individual with DD-Wake

Individual with DD-Davidson

Parent-Bladen

Agency: DHHS-Aging & Adult Services-Wake

Agency: Carolina Institute on DD-Orange

Parent-Mecklenburg

**Staff: Melissa Swartz, Ph.D.**

## Advocacy Development Committee

### **DRAFT MINUTES**

Thursday, February 8, 2024

1:30pm - 4:15pm

ZoomGov - Virtual Meeting Link:

<https://www.zoomgov.com/j/1619990728?pwd=c3pqQUk2UU5Da2hvVFg2UEExqZ2lnQT09>

Virtual Meeting ID: 161 999 0728

**Members Present:** Bryan Dooley, Aldea LaParr, Danielle Matula for Yvonne Copeland, Virginia Knowlton Marcus, Kay McMillan, William Miller, Sarah Smith for Karey Perez, Marjorie Serralles-Russell, Donna Spears (Chair), Anna Ward for Joe Piven,

**Members Absent:** Keith Carney, Myron Gavin, Rep. Zack Hawkins, Tocarra Osborne,

**Staff in Attendance:** Chris Hendricks, David Ingram, Irlanda Ruiz, Melissa Swartz, Talley Wells

**Guests:** Deja Barbour, DSP/Bryan Dooley, Debra Farrington, Kelly Friedlander, Cameron Kempson, Michelle-DSP/Kay McMillan, Michael-DSP/Donna Spears, Dr. Victoria Nneji, Laurel Powell, Monique with SILC, Kelly Woodall

### **Welcome/Introductions:**

The Advocacy Development Committee (ADC) started with welcome by Donna Spears, ADC chair.

### **Approval of Minutes:**

**Aldea LaParr made a motion** to approve the November 2023 Advocacy Development Committee (ADC) minutes. **Kay McMillan seconded** the motion. The motion was approved.

### **Initiative Updates: Ability Leadership Program-NC, Peer Mentor Training, NC Advocacy Leaders Network, Self-Advocate Discussion Series, and Hispanic Disability Advocate**

Kelly Woodall & Kelly Friedlander from Community Bridges Consulting Group provided the ALP-NC initiative update.

Kelly Friedlander from Community Bridges Consulting Group provided the Peer Mentor Training Program initiative update. Along with maintaining its standard PMTP initiative practices, CBCG has partnered with the NC Division of Vocational Rehabilitation. Along with 7 to 10 recruited participants via the standard PMTP application process, 5 additional participants will join the PMTP for which DVRS will invest financial responsibility, including: 3 SWTCIE Participants. (Subminimum Wage to competitive employment Grant Award); 1 DVR Employee (Brendon); 1 VR Client (TBD).

Dr. Victoria Nneji from Akalaka co., provided the NC Advocacy Leaders Network initiative update. The initiative has started creating initiative materials and developing an initiative web page. Dr. Nneji introduced the NC Advocacy Leaders Network initiative to

various organizations and initiated contact with potential allies and collaborators. The initiative will present at the Friday Center in Chapel Hill on Friday, March 8<sup>th</sup> in the UNC School of Social Work Legacy Speakers Series session: “Thriving with Intellectual and Developmental Disabilities Across the Lifespan”.

NCCDD Staff Chris Hendricks provided an update for the NCCDD Self-Advocate Discussion Series and Irlanda Ruiz provided an update for the Hispanic Disability Advocate Initiative. Regarding the Hispanic Disability Advocate Initiative, ADC members request that staff include a list of event names and organizations engaged in future presentations to the ADC.

All initiatives are accomplishing or exceeding initiative objectives and reaching important disability communities.

Adjourn (4:15p.m.)

# Community Living Committee



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



# North Carolina Council on Developmental Disabilities

## Community Living Committee Agenda (Draft as of April 14, 2024)

May 2, 2024

1:30 p.m. – 3:45 p.m.

ZoomGov-Virtual Meeting ID: <https://www.zoomgov.com/j/1612664544?pwd=ckE4eFVtRk1kWGZYT0pKaW10a1doUT09>

Meeting ID: 161 266 4544 Passcode: 809180

1:30 p.m. – 1:50 p.m.	<b>Introduction</b> <ul style="list-style-type: none"> <li>• Welcome</li> <li>• Approval of February minutes</li> <li>• Member Development Activity</li> </ul>	<i>Dr. Charlean Mapson, Chair</i>
1:50 p.m. – 2:00 p.m.	<b>Fiscal Report</b>	<i>Sar'ron Williams, Staff</i>
2:00 p.m. – 3:25 p.m. 2:00 p.m. – 2:15 p.m.	<b>Initiative Updates</b> <ul style="list-style-type: none"> <li>• After the Law: Guiding the I/DD Community to Supported Decision-Making</li> </ul>	<i>Linda Kendall Fields, UNC Cares</i>
2:15 p.m. – 3:05 p.m.	<ul style="list-style-type: none"> <li>• Community Living Mini-Grants: Best Buddies International, Inc.; Bloom Fitness Corporation; East Carolina University; The National Leadership Consortium; ZABS Place</li> </ul>	<i>Various Contractors</i>
3:05 p.m. – 3:25 p.m.	<ul style="list-style-type: none"> <li>• Meet the Need NC</li> </ul>	<i>Beth Field, Mental Health Transformation Alliance</i>
3:25 p.m. – 3:40 p.m.	<b>Future Investment Discussion</b> <ul style="list-style-type: none"> <li>• Proactive Approaches to Justice for People with I/DD RFA</li> <li>• Supporting Parent Advocates</li> </ul>	<i>Dr. Charlean Mapson, Chair Philip Woodward, Staff</i>
3:40 p.m. – 3:45 p.m.	<b>Wrap Up and Reminders</b> <ul style="list-style-type: none"> <li>• Completion of Financial Forms</li> <li>• Survey Reminder</li> <li>• Policy Education Committee Every 2<sup>nd</sup> Thursday from 10:30 a.m.-12:00 p.m. (virtual)</li> <li>• Reminder: Next Council meeting – August 8-9, 2024 (Cary)</li> </ul>	<i>Dr. Charlean Mapson, Chair</i>

### COMMUNITY LIVING COMMITTEE

#### Charlean Mapson, D. Min., Chair

Senator Sydney Batch

Carol Ann Conway

Rhonda Cox; Alternate: Judith Kirkman

Jonathan D'Angelo

Debra Farrington (DHHS); Alternate: Deb Goda

Joshua Gettinger, M.D.

Brendon Hildreth

Gary Junker, Ph.D.; Alternate: *Vacant*

Ryan Rotundo

Bethany Dawn Smith

Dale Stephenson

Peggy Terhune, Ph.D.

**Staff: Philip Woodward**

Parent-New Hanover

Senate Representative-Wake

Individual/Relative Institution-Orange

Non-Profit Agency-Buncombe

Individual with DD-Carteret

Agency: DHHS

Parent-Buncombe

Individual with DD-Craven

Dept. of Adult Correction-Orange

Sibling-Buncombe

Individual with DD-Pitt

Parent-Wake

Local Non-Governmental Agency-Randolph

## **Community Living Committee Minutes Draft**

**February 8, 2024 1:30 p.m. – 4:15 p.m.**

**Members Present:** Jonathan D’Angelo, Carol Conway, Bryan Dooley, Debra Farrington, Dr. Joshua Gettinger, Brendon Hildreth, Dr. Gary Junker, Judith Kirkman, Dr. Charlrean Mapson (Chair), Ryan Rotundo, Bethany Smith, Dale Stephenson, Dr. Peggy Terhune

**Members Absent:** Senator Sydney Batch, Rhonda Cox

**Staff Present:** Pam Dempsey, Talley Wells, Philip Woodward

**Guests Present:** Jessica Aguilar, Deja Barber, Clair Colligan, Paula Coppola, Beth Field, Stacy Morgan, David Owen, Cheryl Powell, Kim Shoaf, Annette Smith, Steve Strom

### **Introduction:**

Charlrean Mapson welcomed the committee and did an icebreaker asking each person to share their birthday month and day.

Charlrean Mapson made a motion to approve the draft November Community Living Committee minutes with one revision to say that the committee approved the August minutes instead of the February minutes. Jonathan D/Angelo seconded the motion. The motion carried with unanimous approval.

### **Fiscal Update:**

Philip Woodward provided the fiscal update since Shar’ron Williams was unable to attend today’s committee meeting. He directed the members to look at the Federal Fiscal Year 2023 funds on Page 3 of the budget report document.

### **Initiative Updates:**

#### **Meet The Need NC**

Beth Field of the Leadership Alliance for Neurodevelopmental Disabilities (LAND) provided a PowerPoint presentation on the *Meet the Need NC* initiative. Beth invited Lived Experience Networks Speaks (LENS) members to this meeting, and she asked them to raise their hand so the committee could see who was present. Beth said the whole advisory council for the initiative decides its agenda. She said I/DD lived experience drives systems change, and the initiative has a core educational and advocacy component because of the large knowledge gap that exists with the Innovations Waiver. She pointed out that the initiative now participates in NCCDD Policy Education Committee meetings. Beth said the first three years are about building

a foundation, she mentioned starting to focus on the sustainability of the initiative during Year 3, and she shared four goals for Year 3.

Carol Conway mentioned the work that other grassroots groups are doing and asked if NCCDD is asking for a lot from LAND in a short amount of time. She also asked if the initiative will host another Think Tank event. Beth replied that the initiative talked with NCCDD staff and presented their top four or five things to focus on and received guidance from the staff. Talley Wells mentioned how the initiative participates in Policy Education Committee meetings. Cheryl Powell said she will make sure the members receive a list of who sits on the LENS group.

### **Supported Living: A How-to Guidebook**

Philip Woodward provided an update on the *Supported Living: A How-to Guidebook* initiative. He said Jen Waite of Liberty Corner Enterprises did not submit a final draft of the Guidebook nor all of the videos that the videographer owes for this initiative, so he will contact the webmaster and the videographer to discuss next steps. He also pointed out that the draft Guidebook is 62 pages long, so he and other NCCDD staff are looking at ways to provide shorter snippets of information about Supported Living. Carol Conway commented that Supported Living will probably struggle to work well until the North Carolina Department of Health and Human Services (DHHS) makes more housing options available. Brendon Hildreth asked if there is a guardianship handbook similar to this Guidebook, and Philip pointed out the Rethinking Guardianship website as a good model site.

### **Economic Impact Study**

Philip Woodward provided an update on the *Economic Impact Study* initiative report. Philip pointed out that the 35-page report provided a dollar number needed to invest in 20,000 Direct Support Professionals (DSPs) at 18 per hour and what economic impact this number would generate. Carol Conway commented that because she is on the board for The Arc of North Carolina, she has seen a draft, and she believes it needs more graphics. Jonathan D'Angelo said would be interesting if someone could do a reverse economic impact study of what happens if the North Carolina General Assembly does not make these investments. He said he believes it could be a domino effect. Carol mentioned parents losing Social Security income by caring for their children with I/DD instead of working. Philip said he and Talley Wells will continue to work with The Arc of North Carolina on how to share this report.

## **Community Living Mini-Grants**

Philip Woodward provided a brief overview of the seven *Community Living Mini-Grants* initiatives.

## **After the Law: Guiding the I/DD Community to Supported Decision-Making**

Philip Woodward provided a brief overview of this new initiative. Carol Conway asked who at UNC Cares is doing this work, and Philip answered that Ali Climo, Linda Kendall Fields, and Annamae Giles are his primary contacts for this initiative.

## **Future Investment Discussion:**

### **Proactive Approaches to Justice for People with I/DD RFA**

Philip Woodward provided an overview of the revisions to this Request for Applications (RFA) that he, Talley Wells, and David Ingram have worked on. Carol Conway suggested adding school resource officers to the list of people eligible to receive this training. She also expressed an interest in serving on the RFA Application Review Committee, as did Jonathan D'Angelo.

## **Wrap Up**

Carol Conway made a motion to adjourn the meeting. Charlrean Mapson seconded the motion. The meeting was adjourned at 3:26 p.m.

# Financial Asset Development Committee



**NCCDD**

North Carolina Council on  
Developmental Disabilities





## **Financial Asset Development Committee (FADC)**

### **Draft Minutes**

**February 8, 2024: 1:30 pm - 4:15 pm**

**Zoomgov (100% Virtual) Meeting: Meeting ID -**

<https://www.zoomgov.com/j/1619990728?pwd=c3pqQUk2UU5Da2hvVFg2UExqZ2lnQT09>

**Committee Members Present:** Katherine (Kat) Boeck, Kenny Gibbs (for Kathy Smith), Tony Hall (Chair), Dr. Carol Ann Hudgens, RV Kuser, Dr. Rebecca Putnam, Nessie Siler, Carla West, Ginger Yarbrough (for Kelly Crosbie)

**Committee Members Absent:** Dawn Allen, Rep. Terry Brown, Madhav Swaminathan, M.D., Sandra Terrell

**Staff in Attendance:** Chris Hendricks, David Ingram, Talley Wells, Letha Young

**Guests:** S. Michael Chapman, Claire Colligan, Beverly Colwell, Paula Coppola, Bryan Dooley, Juanita Hooker, Dreama McCoy, Leah McCray, Pablo Puente, Ann Rodriguez, Brianne Tomaszewski, Dr. Tamira White

### **Introduction**

Tony Hall (Chair) called the committee into session and welcomed the FADC members virtually. He started the meeting with a short ice breaker. He then reviewed the November 2023 meeting minutes and called for a motion to approve those minutes. Rebecca Putnam made a motion to approve the November minutes, and Kat Boeck seconded the motion. A vote was taken, and the minutes were approved by unanimous vote. Tony moved to the fiscal report.

### **Financial Update**

David Ingram, Director of Operations, provided the FAD Committee with the fiscal update and overview of the financial report. The financial report was also e-mailed out to the Committee in advance of the meeting and reviewed in more detail with the full Council during its February Quarterly Council Meeting on February 8, 2024.

## **Initiative Updates**

- **NC Benefits Counseling Expansion Demonstration Project Initiative**  
Pablo Puente from ServiceSource provided the update on this initiative.
- **HBCU IPSE Pre-Planning Initiative**  
The HBCU IPSE Pre-Planning initiative provided an update through Dr. Tamira White.
- **Competitive Integrated Employment (CIE) Summit**  
The Competitive Integrated Employment (CIE) Summit initiative provided an update through Ann Rodriguez. Discussion ensued, including an update from Ginger Yarbrough on NC DMH/DD/SUS' activities' alignment in relation to the CIE Summit's CIE recommendations included in Ann Rodriguez's update.

## **State and National Initiatives**

The committee then received updates from the following State and National Initiatives:

- **NC DHHS Updates (CIE & More)**  
Ginger Yarbrough introduced Brianne Tomaszewski, Principal Investigator Designation for Work Together NC, Claire Colligan, I/DD Consultant, and S. Michael Chapman, NC Division TEACCH and Employment Content Expert for Work Together NC, to provide updates on NC DHHS and other related and co-sponsored efforts promoting CIE. Discussion ensued.
- **National APSE Conference**  
Talley Wells provided an update on the upcoming National APSE Conference in Charlotte, NC. David Ingram and Pam Hunter Dempsey outlined prior experiences at National APSE Conferences, mentioning learning of Peer Support I/DD Training, Benefits Information Network, and Customized Employment Training initiatives that NCCDD later brought to North Carolina as initiatives and/or activities. Discussion ensued.

### **Discussion On Investment Ideas**

Tony Hall invited discussion on Financial Asset Development targets for NCCDD, and discussion ensued on several targets. Entrepreneurship was of particular interest for the NC Council on Developmental Disabilities to look into and research the implementation and related outcomes across the United States.

### **Wrap Up and Reminders**

Tony Hall provided the following announcements:

- The next quarterly NCCDD Council Meeting is scheduled for May 1-3, 2024 in Charlotte, NC.
- The Policy Education Committee meeting is held every 2nd Thursday of each month.

Tony thanked everyone for their input and participation. Kenny Gibbs made a motion to adjourn the meeting. Carla West seconded. The meeting was adjourned at 4:03pm.

# Fiscal Reports



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



**Advocacy Development Committee  
Initiative Update  
As of April 17, 2024**

AKALAKA Co - NC ADVOCACY LEADERS NETWORK			
<b>NCCDD Staff:</b>	Melissa Swartz	<b>Current Year:</b>	Year 1 of 3
<b>Contract Period:</b>	10/01/23 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	The purpose of this initiative is to establish and maintain an organized network of diverse developmental disabilities advocacy leaders made up of North Carolinians that are graduates from state and nationally recognized advocacy and leadership development programs.		
FEDERAL FUNDS			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 26,400.00	\$ 13,200.00	\$ 13,200.00
Travel	\$ 2,436.00	\$ 494.02	\$ 1,941.98
Sub-Contract	\$ 31,719.00	\$ -	\$ 31,719.00
Media/Communication	\$ 12,615.00	\$ 3,358.48	\$ 9,256.52
Professional Services	\$ 330.00	\$ 330.00	\$ -
Other	\$ 3,000.00	\$ -	\$ 3,000.00
Indirect Cost	\$ 13,500.00	\$ 13,500.00	\$ -
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 90,000.00</b>	<b>\$ 30,882.50</b>	<b>\$ 59,117.50</b>
<b>MATCH</b>	<b>\$ 30,000.00</b>	<b>\$ 9,627.95</b>	<b>\$ 20,372.05</b>
<b>TOTAL</b>	<b>\$ 120,000.00</b>	<b>\$ 40,510.45</b>	<b>\$ 79,489.55</b>
Target % Expenses	42%		
Actual % Spent	34%		
Match % Spent	32%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Advocacy Development Committee  
Initiative Update  
As of April 17, 2024**

Community Bridges Consulting Group - Peer Mentor Training for People with IDD: Cohort 3				
<b>NCCDD Staff:</b>	Melissa Swartz	<b>Current Year:</b>	6 months	
<b>Contract Period:</b>	01/01/23 - 06/30/24	<b>Paid From:</b>	2023 FFY	
<b>Last Invoice Received:</b>	January 31, 2024			
<b>Purpose:</b>	<p>The purpose of this initiative is to implement the piloted peer supports training program for individuals who live independently with the use of Home and Community-Based Services (HCBS). The Cohort 3 initiative is a joint venture of Optum, the National Association of Councils on Developmental Disabilities (NACDD), and the NC</p>			
	<b>FEDERAL FUNDS</b>			
	<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
	<b>Salaries</b>	\$ 16,988.00	\$ 5,662.67	\$ 11,325.33
	<b>Fringes</b>	\$ 6,912.00	\$ 768.00	\$ 6,144.00
	<b>Supplies &amp; Materials</b>	\$ 3,750.00	\$ -	\$ 3,750.00
	<b>Equipment</b>	\$ 400.00	\$ -	\$ 400.00
	<b>Travel</b>	\$ 1,200.00	\$ -	\$ 1,200.00
	<b>Sub-Contract</b>	\$ 17,000.00	\$ -	\$ 17,000.00
	<b>Media/Communication</b>	\$ 500.00	\$ -	\$ 500.00
	<b>Indirect Cost</b>	\$ 8,250.00	\$ -	\$ 8,250.00
	<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 55,000.00</b>	<b>\$ 6,430.67</b>	<b>\$ 48,569.33</b>
	<b>MATCH</b>	<b>\$ 18,422.00</b>	<b>\$ 1,952.44</b>	<b>\$ 16,469.56</b>
	<b>TOTAL</b>	<b>\$ 73,422.00</b>	<b>\$ 8,383.11</b>	<b>\$ 65,038.89</b>
	<b>Target % Expenses</b>		33%	
	<b>Actual % Spent</b>		12%	
	<b>Match % Spent</b>		11%	
<b>NOTE:</b>	Both February & March Request for Reimbursement were due by April 15, 2024.			

**Advocacy Development Committee  
Initiative Update  
As of April 17, 2024**

Community Bridges Consulting Group - ALP-NC Coordination and Management			
<b>NCCDD Staff:</b>	Melissa Swartz	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	03/01/23 - 12/31/24	<b>Paid From:</b>	2023/2024 FFY
<b>Last Invoice Received:</b>			
<b>Purpose:</b>	<p>The purpose of this initiative is to make an important investment in integrated leadership development training for individuals with intellectual and other developmental disabilities (I/DD), family members, and guardians along with professionals and other stakeholders.</p>		
FEDERAL FUNDS			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 13,500.00	\$ -	\$ 13,500.00
Fringes	\$ 5,400.00	\$ -	\$ 5,400.00
Supplies & Materials	\$ 9,600.00	\$ -	\$ 9,600.00
Travel	\$ 3,000.00	\$ -	\$ 3,000.00
Sub-Contract	\$ 56,500.00	\$ -	\$ 56,500.00
Media/Communication	\$ 4,500.00	\$ -	\$ 4,500.00
Professional Services	\$ 1,000.00	\$ -	\$ 1,000.00
Indirect Cost	\$ 16,500.00	\$ -	\$ 16,500.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 110,000.00</b>	<b>\$ -</b>	<b>\$ 110,000.00</b>
<b>MATCH</b>	<b>\$ 48,400.00</b>	<b>\$ -</b>	<b>\$ 48,400.00</b>
<b>TOTAL</b>	<b>\$ 158,400.00</b>	<b>\$ -</b>	<b>\$ 158,400.00</b>
Target % Expenses	0%		
Actual % Spent	0%		
Match % Spent	0%		
<b>NOTE:</b>	The March Request for Reimbursement was due by April 15, 2024.		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

Autism Grown Up Inc. - Coommunity Living Mini-Grants: Life Course Library			
<b>NCCDD Staff:</b>	<b>Philip Woodward</b>	<b>Current Year:</b>	<b>9 months</b>
<b>Contract Period:</b>	<b>01/01/24 - 09/30/24</b>	<b>Paid From:</b>	<b>2023 FFY</b>
<b>Last Invoice Received:</b>	<b>March 31, 2024</b>		
<b>Purpose:</b>	The purpose of this initiative is to create three courses to establish the Life Course Library through which individuals with intellectual and other developmental disabilities (I/DD), and particularly autistic individuals across life stage, will have access to more tools in transition and lifespan planning.		
<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 14,000.00	\$ 2,400.00	\$ 11,600.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 14,000.00</b>	<b>\$ 2,400.00</b>	<b>\$ 11,600.00</b>
<b>MATCH</b>	\$ 4,668.00	\$ 667.00	\$ 4,001.00
<b>TOTAL</b>	<b>\$ 18,668.00</b>	<b>\$ 3,067.00</b>	<b>\$ 15,601.00</b>
<b>Target % Expenses</b>	33%		
<b>Actual % Spent</b>	17%		
<b>Match % Spent</b>	14%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

Best Buddies International, Inc - Coommunity Living Mini-Grants: Buddies Transitions Project			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	01/01/24 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	The purpose of this initiative is to provide opportunities for training, experiential learning, and corporate mentorships to transition-aged youth with I/DD to build their capacity to live more successfully in the community		
FEDERAL FUNDS			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
<b>Salaries</b>	\$ 9,300.00	\$ 2,173.06	\$ 7,126.94
<b>Fringe Benefits</b>	\$ 1,395.00	\$ 550.74	\$ 844.26
<b>Equipment</b>	\$ 850.00	\$ -	\$ 850.00
<b>Office Rent</b>	\$ 350.00	\$ 350.00	\$ -
<b>Other</b>	\$ 1,330.00	\$ 684.78	\$ 645.22
<b>Indirect Cost</b>	\$ 1,775.00	\$ 504.46	\$ 1,270.54
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 15,000.00</b>	<b>\$ 4,263.04</b>	<b>\$ 10,736.96</b>
<b>MATCH</b>	<b>\$ 70,019.00</b>	<b>\$ 45,422.94</b>	<b>\$ 24,596.06</b>
<b>TOTAL</b>	<b>\$ 85,019.00</b>	<b>\$ 49,685.98</b>	<b>\$ 35,333.02</b>
<b>Target % Expenses</b>	22%		
<b>Actual % Spent</b>	28%		
<b>Match % Spent</b>	65%		
<b>NOTE:</b> The April Request for Reimbursement is due by May 15, 2024.			

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

<b>Bloom Fitness Corporation - Coommunity Living Mini-Grants: Accessible, Community-Driven Health and Wellness for adults with I/DD</b>			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	01/01/24 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	<p>The purpose of this initiative is to build a highly accessible fitness app specifically designed for and by adults with intellectual and other development disabilities (I/DD) to increase their person health and wellness</p>		
<b>FEDERAL FUNDS</b>			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 10,000.00	\$ 3,000.00	\$ 7,000.00
Sub-Contract	\$ 10,000.00	\$ 10,000.00	\$ -
Media/Communication	\$ 5,000.00	\$ 1,250.00	\$ 3,750.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 25,000.00</b>	<b>\$ 14,250.00</b>	<b>\$ 10,750.00</b>
<b>MATCH</b>	<b>\$ 118,900.00</b>	<b>\$ 17,250.00</b>	<b>\$ 101,650.00</b>
<b>TOTAL</b>	<b>\$ 143,900.00</b>	<b>\$ 31,500.00</b>	<b>\$ 112,400.00</b>
Target % Expenses	22%		
Actual % Spent	57%		
Match % Spent	15%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

Chapters Ahead, Inc - Coomunity Living Mini-Grants: Book Clubs with People with Disabilities			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	01/01/24 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	The purpose of this initiative is to develop a systematic approach for establishing Next Chapter Book Clubs in North Carolina to provide opportunities for people with intellectual and other developmental disabilities (I/DD) to read together in a community setting and develop peer support/friendships.		
<b>FEDERAL FUNDS</b>			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 3,000.00	\$ 750.00	\$ 2,250.00
Sub-Contract	\$ 2,600.00	\$ 650.00	\$ 1,950.00
Other	\$ 900.00	\$ 400.00	\$ 500.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 6,500.00</b>	<b>\$ 1,800.00</b>	<b>\$ 4,700.00</b>
<b>MATCH</b>	<b>\$ 3,563.00</b>	<b>\$ 1,438.00</b>	<b>\$ 2,125.00</b>
<b>TOTAL</b>	<b>\$ 10,063.00</b>	<b>\$ 3,238.00</b>	<b>\$ 6,825.00</b>
Target % Expenses	33%		
Actual % Spent	28%		
Match % Spent	40%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

East Carolina University - Coommunity Living Mini-Grants: The Development and Feasibility of a Community Mobility			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	12/26/23 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	The purpose of this initiative is to create a checklist to address the transportation needs of individuals with intellectual and other developmental disabilities (I/DD) to support and increase successful community living in the community of their choice.		
FEDERAL FUNDS			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 5,768.00	\$ 2,015.64	\$ 3,752.36
Fringe Benefits	\$ 2,081.00	\$ 550.32	\$ 1,530.68
Travel	\$ 1,480.00	\$ -	\$ 1,480.00
Sub-Contract	\$ 4,000.00	\$ -	\$ 4,000.00
Other	\$ 3,647.00	\$ -	\$ 3,647.00
Indirect Cost	\$ 2,996.00	\$ 452.91	\$ 2,543.09
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 19,972.00</b>	<b>\$ 3,018.87</b>	<b>\$ 16,953.13</b>
<b>MATCH</b>	<b>\$ 6,658.00</b>		<b>\$ 6,658.00</b>
<b>TOTAL</b>	<b>\$ 26,630.00</b>	<b>\$ 3,018.87</b>	<b>\$ 23,611.13</b>
Target % Expenses	33%		
Actual % Spent	15%		
Match % Spent	0%		
<b>NOTE:</b> The April Request for Reimbursement is due by May 15, 2024.			

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

The Council on Quality and Leadership - Coommunity Living Mini-Grants			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	01/01/24 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	<p>The purpose of this initiative is to conduct a review of organizations fully or predominantly providing community living services in order to understand the strategies, structures, &amp; practices that advance community living opportunities for people w/ (I/DD), w/ the overarching goal of increasing community living for people with I/DD through enhancing access to essential elements of community living, including community housing, transportation, and healthcare, and by building the knowledge of professionals, people with I/DD, and families about the characteristics and strategies of organizations that provide fully inclusive supports.</p>		
<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
Salaries	\$ 10,672.00	\$ 3,276.99	\$ 7,395.01
Fringe Benefits	\$ 2,876.00	\$ 884.49	\$ 1,991.51
Sub-Contract	\$ 4,400.00	\$ 200.00	\$ 4,200.00
Other	\$ 400.00	\$ 100.00	\$ 300.00
Indirect Cost	\$ 1,180.00	\$ 345.00	\$ 835.00
FEDERAL FUNDS TOTAL	\$ 19,528.00	\$ 4,806.48	\$ 14,721.52
MATCH	\$ 6,535.00	\$ 1,892.49	\$ 4,642.51
TOTAL	\$ 26,063.00	\$ 6,698.97	\$ 19,364.03
Target % Expenses	33%		
Actual % Spent	25%		
Match % Spent	0%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

The University of North Carolina at Chapel Hill, UNC Cares - Coommunity Living Mini-Grants: After the Law: Guiding the I/DD Community to Supported Decision-Making			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	01/01/24 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	<p>The purpose of this initiative is to conduct a review of organizations fully or predominantly providing community living services in order to understand the strategies, structures, &amp; practices that advance community living opportunities for people w/ (I/DD), w/ the overarching goal of increasing community living for people with I/DD through enhancing access to essential elements of community living, including community housing, transportation, and healthcare, and by building the knowledge of professionals, people with I/DD, and families about the characteristics and strategies of organizations that provide fully inclusive supports.</p>		
<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
Salaries	\$ 7,600.00	\$ 2,323.36	\$ 5,276.64
Fringe Benefits	\$ 3,138.00	\$ 761.47	\$ 2,376.53
Supplies & Materials	\$ 450.00	\$ -	\$ 450.00
Travel	\$ 2,200.00	\$ -	\$ 2,200.00
Sub-Contract	\$ 6,600.00	\$ -	\$ 6,600.00
Other	\$ 2,739.00	\$ -	\$ 2,739.00
Indirect Cost	\$ 2,273.00	\$ 308.46	\$ 1,964.54
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 25,000.00</b>	<b>\$ 3,393.29</b>	<b>\$ 21,606.71</b>
<b>MATCH</b>	<b>\$ 6,252.00</b>		<b>\$ 6,252.00</b>
<b>TOTAL</b>	<b>\$ 31,252.00</b>	<b>\$ 3,393.29</b>	<b>\$ 27,858.71</b>
Target % Expenses	33%		
Actual % Spent	14%		
Match % Spent	0%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

ZABs Place - Coommunity Living Mini-Grants: Dream Link Skill Development Tracker and Job Placement Portal			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	9 months
<b>Contract Period:</b>	01/01/24 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	<p>The purpose of this initiative is to develop and implement the Dream Link Skill Development Tracker and Job Placement Portal to help more with (I/DD) participate in transition &amp; lifespan planning by offering them the training and resources to gain &amp; improve transferrable employment skills, connect w/ inclusive employers, &amp; increase the likelihood</p>		
<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
Salaries	\$ 9,150.00	\$ 2,608.00	\$ 6,542.00
Sub-Contract	\$ 15,850.00	\$ 10,054.00	\$ 5,796.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 25,000.00</b>	<b>\$ 12,662.00</b>	<b>\$ 12,338.00</b>
<b>MATCH</b>	<b>\$ 67,045.00</b>	<b>\$ 20,558.00</b>	<b>\$ 46,487.00</b>
<b>TOTAL</b>	<b>\$ 92,045.00</b>	<b>\$ 33,220.00</b>	<b>\$ 58,825.00</b>
Target % Expenses	33%		
Actual % Spent	51%		
Match % Spent	31%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024. .		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

Duke University - I/DD Data			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	6 months
<b>Contract Period:</b>	03/01/24 - 09/30/24	<b>Paid From:</b>	2023/2024 FFY
<b>Last Invoice Received:</b>			
<b>Purpose:</b>	The purpose of this initiative is perform research to collect data related to the intellectual and developmental disability (I/DD) community in North Carolina. This includes population data, funding for services, home and community-based services slots.		
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 15,013.00	\$ -	\$ 15,013.00
Fringe Benefits	\$ 3,783.00		\$ 3,783.00
Indirect Cost	\$ 6,204.00		\$ 6,204.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 25,000.00</b>	<b>\$ -</b>	<b>\$ 25,000.00</b>
MATCH	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 25,000.00</b>	<b>\$ -</b>	<b>\$ 25,000.00</b>
Target % Expenses	0%		
Actual % Spent	0%		
Match % Spent	0%		
<b>NOTE:</b>	The March Request for Reimbursement was due by April 15, 2024.		

**Community Living Committee  
Initiative Update  
As of April 17, 2024**

F.I.R.S.T DBA FIRSTwnc - Supported Living: A How-to Guidebook Completion Project.			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	4.5 months
<b>Contract Period:</b>	04/15/24 - 09/30/24	<b>Paid From:</b>	2024 FFY
<b>Last Invoice Received:</b>			
<b>Purpose:</b>	<p>The purpose of this initiative is to complete the Supported Living: A How-to Guidebook initiative work that NCCDD started in 2021, including making the on-line Guidebook and companion website easy to read and easy to navigate for people with intellectual and other developmental disabilities (I/DD) and their family members.</p>		
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 16,000.00	\$ -	\$ 16,000.00
<b>Fringe Benefits</b>	\$ 2,000.00		\$ 2,000.00
<b>Indirect Cost</b>	\$ 2,000.00		\$ 2,000.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 20,000.00</b>	<b>\$ -</b>	<b>\$ 20,000.00</b>
<b>MATCH</b>	\$ -	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 20,000.00</b>	<b>\$ -</b>	<b>\$ 20,000.00</b>
<b>Target % Expenses</b>	0%		
<b>Actual % Spent</b>	0%		
<b>Match % Spent</b>	0%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Financial Asset Development Committee  
Initiative Update  
As of April 17, 2024**

North Carolina Black Disabilities Network - HBCU Inclusive Postsecondary Edu Training			
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	Year 1 of 3
<b>Contract Period:</b>	10/17/23 - 09/30/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	The purpose of this initiative is to grow awareness and education about the need to increase the number of inclusive postsecondary education programs in NC.		
FEDERAL FUNDS			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 69,500.00	\$ 37,000.02	\$ 32,499.98
Supplies	\$ 500.00	\$ 500.00	\$ -
Travel	\$ 10,000.00	\$ 7,038.91	\$ 2,961.09
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 80,000.00</b>	<b>\$ 44,538.93</b>	<b>\$ 35,461.07</b>
<b>MATCH</b>	<b>\$ 26,667.00</b>	<b>\$ 56,052.02</b>	<b>\$ (29,385.02)</b>
<b>TOTAL</b>	<b>\$ 106,667.00</b>	<b>\$ 100,590.95</b>	<b>\$ 6,076.05</b>
Target % Expenses	43%		
Actual % Spent	56%		
Match % Spent	210%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**Cross Cutting  
Initiative Update  
As of April 17, 2024**

23 EAST GROUP dba O'NEILL PUBLIC RELATIONS - NCCDD COMMUNICATIONS			
<b>NCCDD Staff:</b>	Pamela Dempsey	<b>Current Year:</b>	Year 5 of 5
<b>Contract Period:</b>	10/01/22 - 06/30/24	<b>Paid From:</b>	2022/2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	This initiative conducts communication research, implements, and evaluates social marketing, communication/media campaigns, specific to work and collaboration with individuals with I/DD.		
FEDERAL FUNDS			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 206,300.00	\$ 166,187.38	\$ 40,112.62
Travel	\$ 6,480.00	\$ 5,000.00	\$ 1,480.00
Sub-Contract	\$ 21,040.00	\$ 19,440.00	\$ 1,600.00
Other	\$ 500.00	\$ 500.00	\$ -
Media/Communications	\$ 15,780.00	\$ 13,194.40	\$ 2,585.60
Dues/Subscriptions	\$ 14,900.00	\$ 12,142.66	\$ 2,757.34
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 265,000.00</b>	<b>\$ 216,464.44</b>	<b>\$ 48,535.56</b>
<b>MATCH</b>	<b>\$ 88,334.00</b>	<b>\$ 69,311.39</b>	<b>\$ 19,022.61</b>
<b>TOTAL</b>	<b>\$ 353,334.00</b>	<b>\$ 285,775.83</b>	<b>\$ 67,558.17</b>
Target % Expenses	86%		
Actual % Spent	82%		
Match % Spent	78%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024. A 3 months extension was approved to maintain needed services and ensure NCCDD and OPCG release a robust, competitive RFP.		

**Cross Cutting  
Initiative Update  
As of April 17, 2024**

<b>MENTAL HEALTH TRANSFORMATION ALLIANCE (MHTA) - A COORDINATED CAMPAIGN TO MEET THE UNMET NEEDS</b>			
<b>NCCDD Staff:</b>	Pamela Dempsey	<b>Current Year:</b>	Year 3 of 4
<b>Contract Period:</b>	10/01/23 - 09/31/24	<b>Paid From:</b>	2023 FFY
<b>Last Invoice Received:</b>	March 31, 2024		
<b>Purpose:</b>	<p>The purpose of this initiative is to develop and carry out a coordinated approach to address and positively impact the Registry of Unmet Needs (Registry) so that individuals with I/DD on the Registry who are waiting for Innovations Waiver services and individuals with I/DD not on the Registry who lack services can receive the services they need to live the lives they want to live.</p>		
	<b>FEDERAL FUNDS</b>		
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
Travel	\$ 1,450.00	\$ 1,443.31	\$ 6.69
Sub-Contract	\$ 132,200.00	\$ 67,229.64	\$ 64,970.36
Other	\$ 1,350.00	\$ 1,350.00	\$ -
Indirect Cost	\$ 15,000.00	\$ 7,500.00	\$ 7,500.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 150,000.00</b>	<b>\$ 77,522.95</b>	<b>\$ 72,477.05</b>
	<b>\$ 50,000.00</b>	<b>\$ 41,909.10</b>	<b>\$ 8,090.90</b>
<b>TOTAL</b>	<b>\$ 200,000.00</b>	<b>\$ 119,432.05</b>	<b>\$ 80,567.95</b>
Target % Expenses	50%		
Actual % Spent	52%		
Match % Spent	84%		
<b>NOTE:</b>	The April Request for Reimbursement is due by May 15, 2024.		

**In-House  
Initiative Update  
As of April 17, 2024**

IN-HOUSE CONFERENCE FUNDING			
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	9/on-going
<b>Contract Period:</b>	07/01/23 - 06/30/24	<b>Paid From:</b>	2023 FFY
<b>Purpose:</b>	This initiative provides funding for speakers and presenters that will enhance the Council's work in systems change, advocacy and community capacity to build inclusive communities for persons with intellectual and other developmental disabilities and families.		
	<b>FEDERAL FUNDS</b>		
	<b>IN-HOUSE</b>	<b>BUDGET</b>	<b>EXPENSES</b>
	<b>Conference Funding</b>	\$ 34,000.00	\$ 4,320.13
	<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 34,000.00</b>	<b>\$ 4,320.13</b>
	<b>Target % Expenses</b>	67%	
	<b>Actual % Spent</b>	13%	
<b>NOTE:</b>	\$11,350 is pending for upcoming events and conferences		

**In-House  
Initiative Update  
As of April 17, 2024**

IN-HOUSE COUNCIL DEVELOPMENT FUND			
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	9/on-going
<b>Contract Period:</b>	07/01/23 - 06/30/24	<b>Paid From:</b>	2023 FFY
<b>Purpose:</b>	<p>This initiative provides for the education and training of the membership of the NCCDD to enhance their decision-making skills and abilities regarding practices and policies for people with intellectual and developmental disabilities (I/DD) and their families.</p>		
<b>FEDERAL FUNDS</b>			
<b>IN-HOUSE</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Council Development</b>	\$ 25,000.00	\$ 17,818.52	\$ 7,181.48
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 25,000.00</b>	<b>\$ 17,818.52</b>	<b>\$ 7,181.48</b>
<b>Target % Expenses</b>	67%		
<b>Actual % Spent</b>	71%		
<b>NOTE:</b>	No Pending		

**In-House  
Initiative Update  
As of April 17, 2024**

IN-HOUSE JEAN WOLFF-ROSSI FUND				
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	9/on-going	
<b>Contract Period:</b>	07/01/23 - 06/30/24	<b>Paid From:</b>	2023 FFY	
<b>Purpose:</b>	This initiative provides funding to NC citizens with I/DD and their families to participate in diverse learning forums and conferences, gain information necessary to make informed choices, enhance advocacy and positively impact public policy.			
	<b>FEDERAL FUNDS</b>			
	<b>IN-HOUSE</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
	<b>Jean Wolff-Rossi Fund</b>	\$ 40,000.00	\$ 15,994.62	\$ 24,005.38
	<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 40,000.00</b>	<b>\$ 15,994.62</b>	<b>\$ 24,005.38</b>
	<b>Target % Expenses</b>	67%		
	<b>Actual % Spent</b>	40%		
<b>NOTE:</b>	\$9,070 is pending for upcoming events and conferences			

**In-House  
Initiative Update  
As of April 17, 2024**

IN-HOUSE PUBLIC POLICY																											
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	9/on-going																								
<b>Contract Period:</b>	07/01/23 - 06/30/24	<b>Paid From:</b>	2023 FFY																								
<b>Purpose:</b>	<div style="border: 1px solid black; padding: 5px;"> <p>This initiative provides public policy analysis, enabling the Council to utilize the best available data, research, and practical experiences to inform and advance its mission.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e0f2f1;"> <th colspan="4" style="text-align: center; padding: 5px;">FEDERAL FUNDS</th> </tr> <tr style="background-color: #e0f2f1;"> <th style="text-align: left; padding: 5px;">IN-HOUSE</th> <th style="text-align: right; padding: 5px;">BUDGET</th> <th style="text-align: right; padding: 5px;">EXPENSES</th> <th style="text-align: right; padding: 5px;">BALANCE</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;"><b>Public Policy</b></td> <td style="text-align: right; padding: 5px;">\$ 38,500.00</td> <td style="text-align: right; padding: 5px;">\$ 25,119.00</td> <td style="text-align: right; padding: 5px;">\$ 13,381.00</td> </tr> <tr style="background-color: #e0f2f1;"> <td style="padding: 5px;"><b>FEDERAL FUNDS TOTAL</b></td> <td style="text-align: right; padding: 5px;"><b>\$ 38,500.00</b></td> <td style="text-align: right; padding: 5px;"><b>\$ 25,119.00</b></td> <td style="text-align: right; padding: 5px;"><b>\$ 13,381.00</b></td> </tr> <tr> <td style="padding: 5px;"><b>Target % Expenses</b></td> <td colspan="3" style="text-align: right; padding: 5px;">67%</td> </tr> <tr> <td style="padding: 5px;"><b>Actual % Spent</b></td> <td colspan="3" style="text-align: right; padding: 5px;">65%</td> </tr> </tbody> </table> </div>			FEDERAL FUNDS				IN-HOUSE	BUDGET	EXPENSES	BALANCE	<b>Public Policy</b>	\$ 38,500.00	\$ 25,119.00	\$ 13,381.00	<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 38,500.00</b>	<b>\$ 25,119.00</b>	<b>\$ 13,381.00</b>	<b>Target % Expenses</b>	67%			<b>Actual % Spent</b>	65%		
FEDERAL FUNDS																											
IN-HOUSE	BUDGET	EXPENSES	BALANCE																								
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<b>Target % Expenses</b>	67%																										
<b>Actual % Spent</b>	65%																										
<b>NOTE:</b>	No Pending																										

**In-House  
Initiative Update  
As of April 17, 2024**

IN-HOUSE I/DD SPEAKER, ADVISOR & ADVOCATE				
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	9/on-going	
<b>Contract Period:</b>	07/01/23 - 06/30/24	<b>Paid From:</b>	2023 FFY	
<b>Purpose:</b>	This initiative provide funding to pay self-advocates, family members, and I/DD stakeholders to speak at the Council's Self-Advocacy Discussion Series and Council virtual or in-person events or meetings & to participate in Council ad hoc committees, advisory groups, or activities.			
	<b>FEDERAL FUNDS</b>			
	<b>IN-HOUSE</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
	I/DD Speaker, Advisor & Advocate	\$ 5,000.00	\$ -	\$ 5,000.00
	<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 5,000.00</b>	<b>\$ -</b>	<b>\$ 5,000.00</b>
	<b>Target % Expenses</b>	0%		
	<b>Actual % Spent</b>	0%		
<b>NOTE:</b>				
\$500 pending for 2023 Self Advocate Discussion Series Session May 30, 2023.				

**In-House  
Initiative Update  
As of April 17, 2024**

<b>IN-HOUSE HISPANIC LATINA COMMUNITY HEALTH WORKER</b>			
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	9/on-going
<b>Contract Period:</b>	06/01/22 - 09/30/24	<b>Paid From:</b>	2022 FFY
<b>Purpose:</b>	<p>This initiative is a Council administered fund for a contractor to work with the Council to do community health work such as conduct regular outreach, meetings, education events, provide information, presentations, and connections to support with individuals with I/DD, family members, and stakeholders in Hispanic and Latina/o/x communities in North Carolina. Also work with NCCDD to recruit Hispanic and Latina/o/x Individuals with I/DD and Family Members to apply to join the Council, to take part in Council activities and initiatives, and to be part of state and local boards and commissions. Support NCCDD and its initiative partners in ensuring that communications, events, and initiatives are culturally and linguistically relevant to and responsive of Hispanic or Latina/o/x Individuals with I/DD and Families. Other related community health work as needed</p>		
<b>FEDERAL FUNDS</b>			
<b>IN-HOUSE</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Hispanic Latina Community Health Worker</b>	\$ 95,319.00	\$ 54,751.91	\$ 40,567.09
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 95,319.00</b>	<b>\$ 54,751.91</b>	<b>\$ 40,567.09</b>
<b>Target % Expenses</b>	83%		
<b>Actual % Spent</b>	57%		
<b>NOTE:</b>	<p>This initiative is being funding out of the seprate Federal Funding Award. This fund is coming out the (SCPH) Expanding the Public Health Workforce within the Disability Network: DD Councils Award.</p>		

## BUDGET CATEGORIES DESCRIPTION

CATEGORY	DESCRIPTION
<b>SALARIES</b>	Salaries only for staff hired by the applicant organization to work specifically on the initiative. This may include professional staff, interns, paraprofessionals, and/or part-time/hourly employees.
<b>FRINGE BENEFITS</b>	Fringe Benefits only for staff hired working on the initiative and may include FICA, Unemployment, Worker's Compensation, Health Insurance and/or Retirement Benefits.
<b>SUPPLIES</b>	Supplies may include consumable items that are essential to the program. Examples of allowable supplies include office supplies, computer supplies, medical supplies, furniture, directories and/or journals.
<b>TRAVEL</b>	Travel costs only for staff hired as identified in the budget that is deemed reasonable and necessary to conduct project activities. Examples of travel include staff mileage relating to program operations, lodging, air fare, conference registration fees and meals.
<b>RENT/COST OF SPACE</b>	The Rent/Cost of Space may include rent or lease of office space, equipment, furniture, vehicles, and meeting or conference space cost to be used specifically for the program.
<b>EQUIPMENT</b>	Equipment should possess both of the following characteristics: it is not consumable or expendable and has an expected useful life of longer than one year. Examples of allowable equipment include tele-communication, computers, laptops, iPads, printers, office, assistive technology, medical, vehicles, scientific, and others.
<b>SUB-CONTRACT</b>	Sub-Contract may include essential services which cannot be met by other program staff which specifically relate to the work of the program. Examples of a Sub-Contract may include consultants/contractors, photocopy services, consultants/contractors travel and fiscal services. The Sub-Contract line item must be itemized based on the subcontract agreement. The Council must provide approval prior to grantee entering into any sub-contracts. A copy of the sub-contract must be included.

## BUDGET CATEGORIES DESCRIPTION

CATEGORY	DESCRIPTION
<b>OTHER</b>	The Other category may include audit services, service payment such as stipends, costs incurred for conferences, postage/mail, internet, printing/copies, training/meetings, cleaning/janitorial, license fees, incentives, participants insurance and bonding and any other services or expenses that will not fit into another category.
<b>INDIRECT COST</b>	Indirect Cost rates negotiated with the Department of Health and Human Services Regional Comptroller or other similar federal agency may be used to compute allowable indirect costs. Expenditures included as indirect costs may not be duplicated elsewhere in the budget. A copy of the Negotiation Agreement must be included with the grant application. Indirect/overhead costs may not exceed 15% of the total project cost or \$20,000, whichever is less.
<b>UTILITIES</b>	The cost associated with water, electricity, gas, telephone, and services.
<b>MEDIA/COMMUNICATIONS</b>	The cost incurred for advertising, audio visual presentations, multimedia, tv, radio presentations, logos, promotional items, publications, public service announcements and ads, reprints, text translation into another language, websites, and web materials.
<b>DUES/SUBSCRIPTIONS</b>	Dues includes approved dues for company memberships in professional organizations and subscriptions includes the cost of subscriptions to newspapers, magazines, and periodicals.

## FISCAL TERMS/DESCRIPTIONS

TERM	DESCRIPTION
<b>FEDERAL FISCAL YEAR</b>	This term is defined as the fiscal year for the federal government which begins on October 1 and ends on September 30.
<b>FEDERAL AWARD</b>	This term is defined as a financial grant for any federal program, project, service, or activity provided by the federal government that directly assists domestic governments, organizations, or individuals in the areas of education, health, public safety, public welfare, and public works, among others.
<b>ENCUMBER PERIOD (2 Years)</b>	This term is defined as a two year time period to budget and record expenses.
<b>SPEND BY YEAR 3</b>	This term is defined as all funds from a federal award that need to be spent by year 3 end date of the award.
<b>APPROVED CONTRACT or ANTICIPATED BUDGET</b>	These terms are defined as the contract amount approved to fund a program under a federal award. An anticipated budget is the best estimate of the funds needed to support the work described in a contract.
<b>CURRENT EXPENSE</b>	This term is defined as ongoing business expenses that are accounted for as they occur.
<b>CURRENT UNEXPENDED BALANCE</b>	This term is defined as the actual remaining balance of budgeted funds.
<b>IDENTIFIED PENDING COUNCIL APPROVAL</b>	This term is defined as the initiative dollar amounts that have been identified to propose to the Council for approval.
<b>AVAILABLE FOR NEW INITIATIVES</b>	This term is defined as funds available to seek new in-house initiatives or RFAs.
<b>TOTAL PENDING &amp; AVAILABLE BALANCE</b>	This is the sum of the identified pending Council approval and the funds available for new initiatives.

# Five- Year State Plan



**NCCDD**

North Carolina Council on  
Developmental Disabilities



NCCDD Five-Year State Plan Identifications of  
Council Meeting Activities  
May 2-3, 2024

**COMMITTEE    STATE PLAN ID    DESCRIPTION**

**FULL COUNCIL MEETING-MEMBER DEVELOPMENT**

All Goals            Welcome & Appreciation of Outgoing Members

**FULL COUNCIL MEETING-INITIATIVE UPDATES & FUNDING DISCUSSIONS/REQUESTS**

FAD                    1A/B/C            Financial Asset Development Initiatives / Investment Opportunities

CL                     2A/B/C/D/E      Comm. Living Development Initiatives / Investment Opportunities

AD                     3A/B/C            Advocacy Development Initiatives / Investment Opportunities

AD                     3A                  Bridging Pathways I/DD Peer Mentoring Initiative Update

All Goals            Council Budget: SFY 2024-2025

All Goals            In-House Initiatives: SFY 2024-2025

**FULL COUNCIL MEETING-MEMBER DEVELOPMENT**

All Goals            Public Policy Education Update

All Goals            DMH/DD/SUS Update

All Goals            Lunch Session – Alternate Response/Peer Support

**COMMITTEE MEETING-ADVOCACY DEVELOPMENT**

AD                     3B                  Ability Leadership Project – NC (CBCG)

AD                     3A                  Peer Mentor Training Update

AD                     3A                  NC Advocacy Leaders Network

AD                     3A                  Self-Advocate Discussion Series

AD                     3B                  Hispanic Disability Advocate

AD                     3A/B/C            Fiscal Report

**COMMITTEE MEETING-COMMUNITY LIVING**

CL                     2A-E                Fiscal Report

CL                     2B                  After the Law: Guiding the I/DD Community to Supported Decis...

CL                     2A-E                Community Living Mini-Grants: Best Buddies Intern...

CL                     2B                  Meet the Need NC

CL                     2A-E                Future Investment Discussion

**COMMITTEE MEETING-FINANCIAL ASSET DEVELOPMENT**

FAD	1B/C	Benefits Counseling Expansion Project - Update
FAD	1A/B	HBCU IPSE Pre-Planning Initiative – Update
FAD	1A/B/C	Financial Update
FAD	1A/B/C	State and National Initiatives - Updates
FAD	1A/B/C	Discussion on Potential Investment Ideas

**FULL COUNCIL MEETING-MEMBER DEVELOPMENT**

All Goals	I/DD Town Hall
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**FULL COUNCIL MEETING-NEW BUSINESS**

All Goals	Directors Report
All Goals	NC DHHS Update
All Goals	Financial Report
All Goals	Legislative Update
All Goals	Public Comment
All Goals	Committee Reports
All Goals	IDN Network Partners & State Agency Updates
All Goals	New Business

# For Your Information



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



# NC Black Disability Network Training to Promote Establishment of IPSE Programs at NC HBCUs

## Project Year 1 (of 1)

10/15/2023 – 9/30/2024

### System Gap Addressed

- Universities and colleges have long recognized the importance of a diverse student body. However, many higher education institutions are missing critical opportunities to expand diversity among students by including students with intellectual disabilities. Creating a more inclusive environment and teaching using universal design can have a multiplier effect that will, in turn, attract more students. Inclusive post-secondary educational (IPSE) opportunities for individuals with intellectual disabilities (ID) (or students with ID and co-occurring developmental disabilities) have been expanding for decades. However, IPSE remains a reality that few families consider. Attending college can contribute to growth among individuals with intellectual disabilities in many of the same ways traditional students benefit from postsecondary education: academic and personal skill building, independence, self-advocacy, friendships, and, perhaps most importantly, employment skills.
- The North Carolina Council on Developmental Disabilities, in partnership with the North Carolina Black Disabilities Network, seeks to grow awareness and education about the need to increase the number of inclusive postsecondary education programs in NC. Currently, NC has three comprehensive transition and post-secondary (CTP) programs, but none exist at a Historically Black College and University (HBCU). This yearlong initiative aims to interrupt the cycle of poor access and opportunity to attend college by offering training and support to interested HBCU stakeholders who want to learn about IPSE programs and offer guidance in how to establish an IPSE on their campus.

### Initiative Goals and Timeline

- Conduct Outreach with National and Local Postsecondary Education Alliance Members, North Carolina IPSE Transition Programs, NC Division of Vocational Rehabilitation, Think College, and North Carolina's 11 HBCUs.
- Develop Education and Training Materials and Plan for NC HBCUs inclusive of reasonable and available feedback and recommendations from NCCDD, National and Local Postsecondary Education Alliance Members, North Carolina IPSE Transition Programs, NC Division of Vocational Rehabilitation, Think College, and North Carolina's 11 HBCUs.
- Implement Education and Training to North Carolina's 11 HBCUs on IPSE programs and IPSE program implementation requirements, strategies, and related resources.
- Support NCCDD in updating its HBCU IPSE Request for Applications (RFA) and NCCDD and HBCUs in improving their knowledge and interest in HBCU IPSE programs through creating an IPSE White Paper that includes, but is not limited to, the following information:
  - Summarizes education and awareness campaign for IPSE at HBCUs
  - Provides policy recommendations for capacity building for IPSEs in NC
  - Identifies Potential Funding Sources for IPSE
  - Explores the financial feasibility for students to attend an IPSE
- Provides information on cost modeling for HBCU IPSE Program Implementation

### Description of Activities

- Meet with National and Local Postsecondary Education Alliance Leaders and Diversity Officials.
- Meet with North Carolina IPSE Transition Programs.
- Establish connections with 11 HBCUs.
- Collaborate with IPSE Leaders on training and education curriculum.
- Make modifications to training and education materials and curriculum to include cultural competencies and tailor materials for HBCUs.
- Schedule a cluster luncheon for regional schools to meet and discuss strategies for starting a program.
- Meet with, educate, and learn from HBCU Stakeholders.
- Create and provide an orientation to Institution of Higher Education Programs.

## Outcomes to Date

- Invitations went out to 11 HBCUs to participate in training on their respective campus: 8 of the 11 colleges and universities showed interest, which included: **Bennett College, Johnson C. Smith University, Shaw University, Elizabeth City State University, Winston Salem State University, Fayetteville State University, North Carolina A&T, and North Carolina Central University.** So far, six universities have signed up for training. The learning experience includes information about what defines an IPSE program and the definition of ID and provides insight into model programs, accreditation standards, and resources. Training participants also learn about the funding criteria for financial support from the NC Council on Developmental Disabilities and other Federal Grantors.
- The initiative engaged with National and Local Postsecondary Education Alliance Leaders and Diversity Officials
- The initiative created training materials (PowerPoint, Self-advocate and Parent Interviews, handout materials) and also updated national IPSE training materials through more of an HBCU perspective.
- Initiative leadership visited Tennessee State University and Lipscomb University to explore their IPSE program operations and their IPSE service coordination.

# Ability Leadership Project of NC – Year 1

3/1/2024 – 12/31/2024

## System Gap Addresses

- Developmental disabilities policy-based advocacy leadership development training programs involve high cost, outcomes tracking challenges, and barriers to long-term participant follow-up.
- There are no policy-based advocacy leadership development training programs where people with intellectual and other developmental disabilities (I/DD), parents, professionals and other stakeholders train together.
- Individuals with I/DD are rarely training facilitators or coordinators for policy-based advocacy leadership training initiatives geared towards individuals with I/DD and their families; and nearly never facilitators and coordinators if the leadership training program is geared toward professionals.

## Initiative Goals and Timeline

- Graduates of the ALP-NC leadership development training will gain the skills necessary to effectively advocate for self and others.
- Design and produce virtual education and meetings that are accessible and seamless for the end user.
- Tailor the training approach and content to align with ALP-NC's values, methodologies, and mission, specifically addressing the needs of people with I/DD and their family members. Integrate practical examples and relevant case studies to enhance the training's applicability and effectiveness.
- Update facilitating strategies and techniques to suit the facilitators' skill sets and learning styles, focusing on interactive, participant-engaged methods.
- Incorporate modern technological tools and digital platforms to reflect the latest trends and best practices in digital learning.
- Develop unique participant engagement techniques, ensuring the training resonates with ALP's target audience.
- Refine the learning objectives, language, and terminology to closely align with ALP-NC's goals, target audience, and mission.
- Restructure and reformat the training sessions to better meet the operational needs and preferences of the initiative staff and leaders.
- Develop a method for maintaining long-term contact with training graduates.

## Outcomes to Date

- Transitioned contract to Community Bridges Consulting Group (CBCG) from Disability Rights NC who piloted and launched the initiative.
- Individuals with I/DD have lead roles or actively co-lead all aspects of the training, including training coordination, training facilitation, and evaluation.
- Finalized the inclusive leadership development training curriculum and facilitator's guide.
- Finalized the Train the Trainer curriculum and facilitator's guide.
- During DRNC contract graduated 54 trainees with the skills necessary to effectively advocate for self and others (e.g., speak to policy and other decision-makers, give testimony, etc.) at local state and federal levels to promote systems change.
- Held 2 Train the Trainer Programs involving 13 participants.
- Prepared 7 trainers of diverse representation including 3 individuals with I/DD.
- Hired a person with IDD as Co-Director/program coordinator for administrative and training responsibilities.
- In March 2024, began promoting for a new training cohort to begin in April 2024.

# NC Advocacy Leaders Network – Year 1

## 10/1/2023 – 9/30/2024

### System Gap Addresses

- North Carolina does not have an organized network of developmental disabilities advocacy leaders made up of North Carolinians that are graduates from state and nationally recognized advocacy and leadership development programs, including:
  - *Partners in Policymaking*®, *Advancing Strong Leadership*, *Leadership Education in Neurodevelopmental Related Disabilities*, *Steps Toward Independence and Responsibility*, *Ability Leadership Project of NC*, and *NC IDD Peer Mentor Training*. Other non-disability specific innovative leadership training programs (e.g., *The Council on Quality and Leadership professional leadership*) will be considered.

### Initiative Goals and Timeline

- Establish, maintain, and engage an NC Advocacy Leaders Network made up of North Carolinian graduates of state and nationally recognized advocacy and leadership development programs.
- In collaboration with the NCCDD, establish and maintain the customer relationship management (CRM) data collection system to record and track network member contact and related information, continued education experiences, and advocacy activity.
- Keep informed of the Council's Five-Year State Plan goals and public policy priorities for continued education and engagement opportunities for network members.
- Establish the NC Advocacy Leaders Network as a shared benefit and shared investment for NC orgs, entities, etc. that need well-trained/informed, and savvy advocates including individuals with IDD/self-advocates, parents, family members, and other stakeholders to advance advocacy priorities.

The investment by the NCCDD to Akalaka co. started October 2023 and will end September 2024.

### Description of Activities

- Maintain regular contact with network members to:
  - a) continuously build members confidence in reliability of the network;
  - b) keep members informed of disability-related news;
  - c) continuously build upon member skills and knowledge;
  - d) actively work to strengthen member relationships with network coordinators and the NCCDD; and
  - e) connect members with other advocacy organizations and opportunities.
- Coordinate and implement a minimum of 6 virtual gatherings of the network as “getting to know you” experiences and to set the foundation for future events involving continuing education, advocacy, engagement, or information sharing.

### Outcomes to Date

The investment by the NCCDD to Akalaka co. started October 2023 and will end September 2024.

- Developed a webpage, 1-page flyer and email that offers a concise overview of the initiative, including website and contact details.
- Provided introduction presentation of the initiative and recruitment message at 2 statewide events.
- Opened access to the website: <https://www.akalaka.org/nc-advocacy-leaders-network>

# Peer Mentoring for People with I/DD: Third Cohort

1/1/2024 – 9/30/2024

## System Gap Addresses

- Medicaid benefits covering peer support services for individuals with mental illness and/or addiction disorders are well established, and peer mentors have shown positive outcomes.
- Peer support services for individuals with intellectual and developmental disabilities (I/DD) are not well established.
- This initiative aims to demonstrate that peer mentors with an I/DD can positively impact the lives of other individuals with I/DD and their families.

## Initiative Goals and Timeline

- Further develop the peer mentor training curriculum to increase peer mentor programs for individuals with I/DD.
- Train 10 – 15 additional NC Peer Mentors with IDD.
- Promote the IDD Peer Mentor job position for the NC Division of Employment and Independence for People with Disabilities (EIPD).
- Further Promote the Community Health Worker job position as developed by Alliance Health Care Management.
- Develop additional job description(s) for peer mentor with IDD.
- This investment by the NCCDD is for up to six-months: January 1, 2024, through September 30, 2024.

## Description of Activities

Coordinated by Community Bridges Consulting Group, this initiative has been a joint venture of Optum, the National Association of Councils on Developmental Disabilities (NACDD), and the North Carolina Council on Developmental Disabilities and now includes the NC Division of Vocational Rehabilitation Services (NCDVRS). The purpose of the Peer Mentoring Training for People with IDD: Third Cohort is to implement the peer mentoring training program for individuals who live independently with the use of Home and Community-Based Services (HCBS). Cohort members will learn key concepts to support peers with I/DD. All classes incorporate learning activities to be done as a group and individually, as well as knowledge checks. Participants will complete a pre-training and post-training evaluation to provide feedback which will be incorporated to improve the overall curriculum. Initiative activities include:

- Recruiting and selecting peer mentor trainees.
- Assessing and assisting with accommodation needs for peer mentors.
- Implementing Peer Mentor Training for 10 - 15 participants.
- Developing local connections and providing guidance to advance the initiative.
- Developing/finalizing a job description in concert with project partners, including NC Division of EIPD.

## Expected Outcomes

- Implement the piloted curriculum to train 10 – 15 Peer Mentors with intellectual and developmental disabilities, including individuals recommended by NC Division of EIPD.
- Conduct evaluation of Peer Mentor Training for People with individuals with intellectual and developmental disabilities curriculum.
- Build and manage relationships with and among partners and other key stakeholders and serve as a resource for content, ideas, and thought partnership.
- Create infrastructure for network connectivity, acting as a liaison to build deep, sustainable partnerships, prioritizing transformational change.
- Analyze a diversity of data points to inform next steps and long-term goals.
- Identify and respond to conflicts and misalignment, if any, between stakeholders.
- Lead monthly stakeholder calls and other activities that deepen connections and relationships to and among stakeholders.
- Gainful employment for graduates of the Peer Mentor training for people with I/DD.

# Self-Advocate Discussion Series

10/1/2023 – 9/30/2024

## System Gap Addresses

NCCDD has the need to attract, prepare, organize and mobilize NC self-advocates for influencing social and systems change. More NC self-advocates interested in advocating the value of people with disabilities are needed to actively build and maintain relationships with NC legislators and decision-makers. In addition, self-advocates will be supported to develop working relationships and a network among themselves.

## Initiative Goals and Timeline

The NCCDD sponsors a monthly NC self-advocate discussion series facilitated by the NCCDD Policy Education Coordinator, NCCDD self-advocate executive committee members, and additional coordinated participation by other NCCDD self-advocate members and staff. One- hour discussion sessions occur monthly. The discussion series is coordinated by NCCDD Advocacy Development Committee staff and by the NCCDD Policy Education Coordinator with support from NCCDD administrative staff, and the Hispanic Advocate initiative staff.

Each session is dedicated to addressing one IDD advocacy topic. Facilitators provide background on the topic and support attendees to share personal stories related to the topic. Sessions aim to be practice forums for using personal stories to build relationships with NC decision-makers and legislators. Experts, trainers, and decision-makers are invited to designated sessions to offer approaches for accessing, conversing, and following up with legislators and policymakers.

## Description of Activities

**Sessions share and hear stories of lived experience and meet NC Self-Advocate leaders and topic experts.**

Sessions are dedicated to sharing topic oriented personal stories, NC self-advocate network relationship building, NCCDD awareness, and just being with others who have common interests. Expect sharing and hearing personal stories of lived experience about topics important to IDD advocacy. Join the conversation, spend time with others who have common interests, and become part of the NCCDD community. Sessions balance training, knowledge sharing, and attendee participation to convey the best ways to use our personal stories to discuss topics important to I/DD advocacy.

## Achievements and Outcomes to Date

Since Nov. 2021 start:

- 27 # of Self-Advocate Discussion Series sessions held
- 697 # of People Registered in FFY 2022 to attend sessions (includes duplicates and staff)
- 1,059 # of People Registered in FFY 2023 to attend sessions (includes duplicates and staff)
- 661 # of People Registered in FFY 2024 to attend sessions (includes duplicates and staff)
- 322 # of People Registered to date self-identified as person with IDD (includes duplicates)
- 21 # of Topics discussed at series sessions (e.g., Valuable Principle, Voting, How to Talk to Legislators, Employment, Anniversaries: ADA, DD Act, NDEAM, Transportation, DSP Crisis/Waiting List, Emergency Preparedness, and more.)

# Supported Living: A How-to Guidebook

Start date: July 2021

## System Gap Addressed

- This initiative is made possible through a collaborative relationship between the NCCDD and North Carolina Money Follows the Person Project (NC MFP), a Medicaid project that assists Medicaid-eligible North Carolinians who live in inpatient facilities to move into their own homes and communities with supports.
- This initiative will build upon the existing Supported Living Guidebook/Resource Manual developed by NCCDD's Supported Living: Making the Difference initiative: <https://nccdd.org/supported-living-making-the-difference.html>. The purpose of this new initiative is to create a how-to guidebook to help individuals with the highest level of needs successfully access and use the Supported Living Innovations Waiver service that helps individuals with I/DD live in a home of their choice in the community with supports.
- Supported Living provides an opportunity for individuals with complex needs for support to participate in community life.
- While opportunities exist for these individuals to receive funds through a Home and Community Based waiver to supports complex needs, providers and families would benefit from a guidebook to implement and operationalize Supported Living in North Carolina. In the absence of practical guidance on the implementation of supports and approaches to overcoming commonly recognized barriers, individuals with I/DD, families, and providers become reluctant to use the service.
- A how-to guidebook is needed to operationalize the supports, staffing, and community integration of individuals with complex needs as well as to identify approaches to barriers that arise from a variety of factors in the provision of Supported Living for individuals who have the highest levels of need (Levels 2 and 3).
- This initiative supports NCCDD's Goal 2 of the current Five-Year Plan: Increase community living for individuals with I/DD.

## Initiative Goals and Timeline

- Develop a “nuts and bolts” guidebook with practical guidance for individuals with I/DD, families, providers, Direct Support Professionals (DSPs), and policymakers.
- Identify systemic barriers that continue to exist related to Supported Living, particularly for individuals with the highest levels of need, and share these barriers and any suggested recommendations for systemic change with the Council and its partners.

## Description of Activities

- Create, convene, and facilitate a workgroup or workgroups to provide advice to this initiative and review outlines and drafts of the guidebook.
- Conduct focus groups for individuals with I/DD and their families, providers, DSPs, agency leaders, and policymakers to understand the barriers, opportunities, and best practices related to the provision of Supported Living Level 2 and 3 services as well as the diverse needs of individuals using these services or who are considering using these services.
- Collect, review, and identify best practices, content, and format ideas from relevant resources from other states, experts, and organizations who have experience with Supported Living.
- Identify five or more successful examples of people in North Carolina received Supported Living Level 2 and 3 services to embed as illustrative stories through each of the steps, including barriers they faced and how they were able to overcome the barriers.
- Develop worksheets (print and on-line) and activities that readers can use to both transfer their learning and capture their support needs from each step of the process to their own unique circumstances in taking their own action in moving Supported Living Levels 2 and 3 forward.
- Prepare the draft guidebook in a simple and cognitively accessible format that incorporates principles of plain language and/or the easy read format to make it easy for individuals with I/DD and their family members to read and understand.
- Field test the draft guidebook with stakeholders and experts in Supported Living and incorporate feedback throughout the development of the guidebook.

## **Achievements and Outcomes to Date**

- Contractor, Liberty Corner Enterprises, participated in NCCDD's Supported Living: Making the Difference initiative and participates in quarterly Level 2 & 3 Stakeholders meetings and Level 2 & 3 Action Team meetings.
- Identified guidebook content important to individuals with I/DD, families and providers of Supported Living.
- Hosted monthly workgroup meetings for providers of Supported Living Level 2 and 3 to provide feedback on the guidebook's content.
- Identified two individuals receiving Supported Living services to share their Supported Living story during NCCDD's Draft Olmstead Plan Virtual Forum on October 18, 2021.
- A draft guidebook was unveiled at the Supported Living Level 2 & 3 Stakeholders meeting on September 28, 2023 and is available at [www.SLNC4.me](http://www.SLNC4.me).
- Captioned videos of individuals receiving Supported Living Level 2 and 3 are available on the website. A third, long video discussing how Supported Living 2 and 3 is provided is in development for inclusion on the website.
- A hybrid Supported Living – NC Innovations – Learning and Living Together Conference occurred on April 20, 2023 in Asheville with at least 47 in-person participants.
- The initiative presented Supported Living Lunch and Learn sessions in July and August 2023 with at least 88 and 91 participants at each one, respectively.
- NCCDD staff and stakeholders have identified important Supported Living topics to create plain language and easy-to-read one-pagers to share this information.
- NCCDD has developed a plan for working with a provider organization to revise and finalize the draft Guidebook and improve the readability and usability of information on the Guidebook website.

## **Expected System Change as Result**

- More individuals with I/DD, particularly those individuals with the highest level of support needs, will be able to successfully access and utilize Supported Living services.
- More families of individuals using Supported Living will understand how to do it successfully.
- The Supported Living Innovations Waiver service will expand sustainably in North Carolina as more individuals with I/DD access and use it and as more provider agencies better understand how to provide this service successfully.
- More individuals with I/DD will live in a home of their choice in the community with the supports they need.
- More individuals with I/DD will be fully included, respected, valued, and supported in their communities.



## Community Living Mini-Grants

Start Date January 1, 2024

### System Gap Addressed

- In 2023, NCCDD awarded seven Community Living Mini-Grants initiatives to organizations that proposed doing activities to advance NCCDD's Community Living goal and support systems change activities or build capacity to enable individuals with intellectual and other developmental disabilities (I/DD) to live full and meaningful lives in the community. These seven initiatives started around January 1, 2024 and will continue until September 30, 2024. The list of initiatives and contractors includes:

### Initiative Goals, Achievements and Outcomes

#### **Autism Grown Up**

- The purpose of this initiative is to create three courses to establish the Life Course Library through which individuals with I/DD, and particularly autistic individuals across life stage, will have access to more tools in transition and lifespan planning.

#### **Best Buddies International, Inc.**

- The purpose of this initiative is to provide opportunities for training, experiential learning, and corporate mentorships to transition-aged youth with I/DD to build their capacity to live more successfully in the community.

#### **Bloom Fitness Corporation**

- The purpose of this initiative is to increase personal health and wellness for adults with I/DD in the building of a highly accessible fitness app specifically designed for and by adults with I/DD.

#### **Chapters Ahead Inc**

- The purpose of this initiative is to develop a systematic approach for establishing Next Chapter Book Clubs in North Carolina to provide opportunities for people with I/DD to read together in a community setting and develop peer support/friendships.

#### **East Carolina University**

- The purpose of this initiative is to create a checklist to address the transportation needs of individuals with I/DD to support and increase successful community living in the community of their choice. The checklist will be used by people with I/DD, occupational therapists, other healthcare providers, family members of people with I/DD, and others who can use the tool to identify skills, abilities, and challenges that are enhancers or barriers to effective community mobility.

#### **The National Leadership Consortium, an Affiliate of CQL | The Council on Quality and Leadership**

- The purpose of this initiative is to conduct a review of organizations fully or predominantly providing community living services in order to understand the strategies, structures, and practices that advance community living opportunities for people with I/DD, with the overarching goal of increasing community living for people with I/DD through enhancing access to essential elements of community living, including community housing, transportation, and healthcare, and by building the knowledge of professionals, people with I/DD, and families about the characteristics and strategies of organizations that provide fully inclusive supports.

#### **ZABS Place**

- The purpose of this initiative is to enhance the development and implementation of ZABS Place's Dream Link Skill Development Tracker and Job Placement Portal to help more individuals with I/DD participate in transition and lifespan planning by offering them the training and resources to gain and improve transferrable employment skills, connect with inclusive employers, and increase the likelihood of them being hired and retained for a job that fits with their career goals.

# After the Law: Guiding the I/DD Community to Supported Decision-Making

Start Date: January 2024

## System Gap Addressed

- Critical issues related to healthcare decision-making arose during the COVID-19 pandemic for individuals with I/DD.
- Individuals with I/DD have historically been prevented from making many critical life decisions because their rights have been unnecessarily taken from them through guardianship when some type of other supported decision-making or independent decision-making was possible.

## Initiative Goals and Timeline

- Build on the work of NCCDD's previous initiatives that focused on rethinking North Carolina's guardianship system and promoting alternatives to full guardianship.
- Educate individuals with I/DD, family members, the legal community, and other key stakeholders about the new Guardianship Rights law titled "[An Act to . . . promote the rights and independence of persons subject to the guardianship process.](#)"
- Educate community members on how these rights may specifically offer more independence in healthcare decision-making in preparation for or in light of any future pandemic.

## Description of Activities

- Identify and assemble subject matter experts and advisory council members, including people with I/DD, family members, and professionals.
- Develop a Decision Tree for people in guardianship proceedings, particularly people with I/DD, family members, and professionals in the I/DD community.
- Complete the Guardianship Alternatives Step-By-Step Guide, incorporate the Decision Tree as well as previously produced materials on the [Rethinking Guardianship website](#).

## Achievements and Outcomes to Date

- Identified and assembled an Advisory Committee consisting of 17 people who include people with I/DD, family members and professionals who are all people with lived experience and/or subject matter experts.
- Convened four Advisory Council meetings.
- Consulted with 14 subject matter experts during the first quarter through establishing checkpoints with them to provide written content and feedback on the Step-By-Step guide, including the Decision Tree.
- Reviewed the North Carolina Guardianship Capacity Questionnaire, an Administrative Office of the Courts (AOC) form, and differentiated between decision-making, communication and skill-based items appearing on the form.
- Expanded the original list of 12 options for supported decision-making, only three of which related to health. New options include the use of assistive and adaptive technologies.

## Expected System Change as Result

- More people with I/DD will be aware of supported decision-making and other alternatives to full guardianship, especially regarding healthcare decision-making.
- More individuals with I/DD, family members, member of the legal community, and other stakeholders will be aware of the new Guardianship Rights Law in North Carolina.

# Competitive Integrated Employment Engagement, White Paper & Conference

## System Gap Addressed

### ***Why is NCCDD funding this initiative?***

The North Carolina Council on Developmental Disabilities (NCCDD) contracted with i2i Center for Integrated Health to engage the I/DD community and stakeholders in dialogue and visioning for North Carolina's transition to Competitive Integrated Employment (CIE). The North Carolina Department of Health and Human Services (NCDHHS) has made a commitment to increase CIE and has several initiatives moving this forward. There have been significant questions, concerns, and interest in increasing CIE.

### ***What is Competitive Integrated Employment?***

Competitive Integrated Employment is a national and local effort to increase inclusive employment for individuals with disabilities in integrated settings at competitive wages. Through federal legislation and policy, the federal government is prompting States to create plans of action that will move the States toward Competitive Integrated Employment principles, policies, and processes. Governor Cooper has issued an Executive Order outlining the Employment First initiative. In addition, North Carolina Department of Health and Human Services has developed a Five-Year Strategic Plan to increase Competitive Integrated Employment. There are many perspectives on how North Carolina should proceed with this transition, the timing and important considerations.

## Initiative Goals and Objectives

The i2i Center for Integrative Health interviewed individuals representing all stakeholders in the Competitive Integrated Employment discussion and then engaged in an initial information session with stakeholders, providers, and state leaders, and developed a [White Paper](#). Then, i2i took the "leveling the knowledge" component of the initial discussion and placed alongside it national perspectives and lessons learned from NC and other States to ensure that all participants have the same basic understanding of the intent behind Competitive Integrated Employment. Hosting a pre-conference to its semi-annual conference, i2i embedded in the pre-conference this information and these perspectives, serving to meet the following goals of the initiative:

1. Learn about and educate on New Funding and Initiatives for Competitive Integrated Employment in North Carolina.
2. Further an understanding and inclusion of all CIE perspectives as the state increases Competitive Integrated Employment opportunities.
3. Find common ground on moving CIE forward in NC.
4. Hear updated information as well as a national perspective.

## Achievements and Outcomes to Date

### **Key 12-Month Goals Identified at Summit: Topic Areas**

#### *Policy and Funding for Competitive Integrated Employment:*

- Funding for providers to transform service models.
- Discuss as separate concepts, 14(c) & ADVP
- Providing funds to ADVPs/subminimum wage employers (in addition to SPARK pilot sites) to transition to paying participants at least minimum wage. Funds can be used to support hiring and training job coaches for individuals that need an individual job coach.
- Dismantle workshops *after* implementing something better / somewhere better to go to.

#### *Train Providers of Supported Employment and Tailored Care Managers:*

- Consider the creation of a Supported Employment training all providers should utilize across the state for Direct Support Workers so there is consistency amongst job coaches.
- Ensure adequate training of MCO staff (Care Managers) so they can properly educate on CIE/SE.

*Educating Employers Around the State and Building Employment Opportunities:*

- Create FAQ sheet to be provided to potential employers educating on labor laws / benefits of SE.
- Fund provider transformation to help employers who are competitive transition toward inclusion.
- Utilize peer employers to share their success stories.
- Educate employers about employing people with disabilities (e.g., Windmills Trainings).

*Strengthening Components of Supported Employment:*

- Job and Benefits Coaching
- Increase Employment Supports
- Build Workforce Competencies
- Interface with Individuals living with I/DD around CIE

*Address Social Determinants of Health (SDoH) that Impact Employment:*

- Address SDoHs that negatively impact employment for individuals living with I/DD – e.g., transportation, communication barriers.
- Promote more transportation options (e.g., Lyft, mileage rates, support rates).
- Recognition/Funding of transportation as a stand-alone, life-long service (as needed).

## **Additional information**

### **Who is the contractor and how can I get involved?**

The [i2i Center for Integrated Health](#) is the contractor. Contact Ann Rodriguez, MHA, Executive Director at [ann@i2icenter.org](mailto:ann@i2icenter.org) to learn how to get involved or if you have questions.

**Download the CIE White Paper:** [North Carolina Transition to Competitive Integrated Employment: Valuing all Perspectives \(2022\)](#)

# NC Benefits Counseling Expansion Project Year 3 (of 3)

7/1/2024 - 3/31/2024

## System Gap Addressed

- Research on Work Incentives Planning and Assistance (WIPA) projects demonstrates that individuals who receive benefits counseling services are more likely to pursue employment, maintain employment, and leverage available incentives that support their goal of greater financial security and independence.
- The North Carolina Benefits Counseling Services Demonstration Project initiative will attempt to demonstrate the impact of using a tiered model to address the lack of system capacity for providing benefits counseling services to individuals receiving federal and state public assistance.

## Initiative Goals and Timeline

- Expand benefits counseling services throughout the state by increasing service capacity through the training of service provider staff as Benefits Liaisons to provide general benefits information and referrals.
- Increase employment participation through provision of initial benefits counseling advisement, benefits information and referral, benefits service plans, and on-going support including access to certified benefits counselors.
- Serve individuals or families through trained partner agencies (service providers, employers, training programs, and family support groups).
- Development of Referral Network (Years 1, 2, and 3).
- Development of Benefits Liaison training curriculum (Years 1, 2, and 3).
- Enhance training of Benefits Liaisons through including specific examples of the impact and benefits of Benefits Counseling examples.
- Tailor family seminars for partner agencies to include relevant benefits topics to parents, family members and other support professionals.

## Description of Activities

Year Three included the following activities:

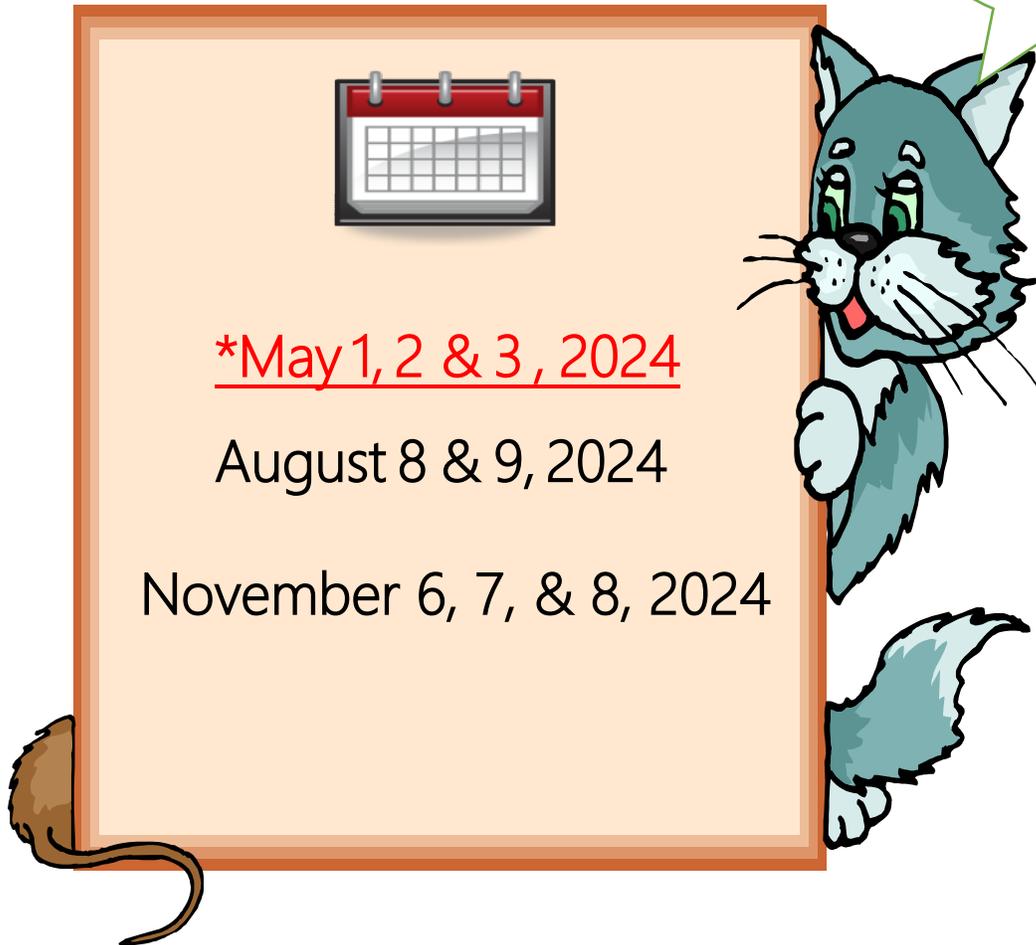
- Delivered additional, enhanced training to agencies.
- Increased and enhanced educational materials sent out to referrals networks.
- Improved in gathering and analyzing outcome data and success stories.
- Delivered family seminars across the state to support financial family decisions.
- Increased the number of individuals pursuing Competitive Integrated Employment activities through trained Benefits Liaisons and family seminars.

## Achievements and Outcomes to Date

- Reached out to 303 organizations that serve individuals with I/DD across the state.
- Built 21 new partnerships with family and parent groups. Additionally, formalized 21 partnerships through MOUs with agencies providing services to I/DD individuals.
- Established Benefits Counseling Expansion advisory committee –11 members.
- Trained 141 Benefits Liaisons (partner staff) across the state.
- 145 individuals with I/DD received benefits counseling from a trained Benefits Liaison
- 470 family members have been trained in benefits.
- Provided benefits counseling services to 60 individuals with I/DD and their families.
- Trained 75+ Hispanic/Latino family members with Benefits information in Spanish.
- Distribute benefits information through monthly newsletters, monthly training, and participation in open houses, resource fairs, job fairs, symposiums, and similar events.

# Council Meeting Dates

Please mark your calendars! We want to see you there.



Location: Hilton Garden Inn  
131 Columbus Ave, Cary, NC 27518  
919-377-0440

\* Location: Doubletree Charlotte Airport  
2600 Yorkmont Road, Charlotte, NC 28208  
704-357-9100