



**NCCDD**  
North Carolina Council on  
Developmental Disabilities

## Quarterly Council Meeting

*Improving the opportunities and lives  
of North Carolinians with I/DD and their families  
through advocacy, capacity building  
and systems change*



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**Hilton Garden Inn**  
**131 Columbus Avenue**  
**Cary, NC 27518**

**Phone: 919-377-0440**

**Fax: 919-377-0445**



**NCCDD  
STAFF ON CALL**



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



## 2019 COUNCIL ON DEVELOPMENTAL DISABILITIES

### EXECUTIVE COMMITTEE

#### **Alex McArthur: Chair**

Myron Michelle Gavin: Vice-Chair  
Cheryl Powell: Vice-Chair  
Aldea LaParr: Secretary  
Amanda Bergen: Chair, Financial Asset Development  
Kerri Eaker: Chair, Community Living  
Nessie Siler: Chair, Advocacy Development

*Staff: Executive Director (Vacant), JoAnn Toomey, Yadira Vasquez*

### FINANCIAL ASSET DEVELOPMENT COMMITTEE

#### **Amanda Bergen, Chair**

Dawn Allen  
Anna Cunningham  
Chris Egan; Alternate: Jim Swain, Kathie Trotter  
Myron Michelle Gavin  
William Miller  
Wing Ng, M.D.  
Dave Richard, Deputy Secretary, NC Medicaid  
Ryan Rotundo  
Daniel Smith  
Sherry Thomas; Alternate: Dreama McCoy  
Vacant; Alternate: Teresa Strom  
Kelly Woodall

*Staff: Travis Williams*

### COMMUNITY LIVING COMMITTEE

#### **Kerri Eaker, Chair**

Katherine Boeck  
Allison Dodson  
Christina Dupuch; Alternate: Andrea Misenheimer  
Joshua Gettinger, M.D.  
Brendon Hildreth  
Kristy Locklear  
Virginia Knowlton Marcus  
Senator Mujtaba Mohammed  
James Stephenson  
Peggy Terhune, Ph.D.  
Sandra Terrell; Alternate: Deb Goda  
Vacant; Alternate: Mya Lewis

*Staff: Phillip Woodward*

### APPOINTED POSITION/COUNTY

Individual with DD-Wake  
Parent-Craven  
Individual with DD-New Hanover  
Individual with DD-Wayne  
Parent-Mecklenburg  
Parent-Buncombe  
Individual with DD-Dare  
  
Parent-Mecklenburg  
Public At Large-Stanly  
Parent-Wake  
Agency: DHHS-Voc. Rehabilitation-Durham  
Parent-Craven  
Individual with DD-Davidson  
Parent-Wake  
Agency: DHHS-Wake  
Sibling-Buncombe  
Parent-Guilford  
Agency: Dept. Public Instruction-Wake  
Agency: DHHS-Social Services-Wake  
Individual with DD-Wake

Parent-Buncombe  
Individual with DD-Edgecombe  
Sibling-Watauga  
Non-Profit Agency-Buncombe  
Parent-Buncombe  
Individual with DD-Craven  
Parent-Robeson  
Agency: Disability Rights NC-Wake  
Senate Representative-Mecklenburg  
Parent-Wake  
Local Non-Governmental Agency-Randolph  
Agency: DHHS-NC Medicaid-Wake  
Agency: DHHS-MH/DD/SAS-Wake

**ADVOCACY DEVELOPMENT COMMITTEE**

**Nessie Siler, Chair**

Eric Chavis  
NaKima Clark  
Bryan Dooley  
Mary Edwards; Alternate: Joseph Breen  
Jason Faircloth  
Katie Holler  
Representative Verla Insko  
Gary Junker, Ph.D.; Alternate: Jamila Little  
Kelly Kimple, M.D.; Alternate: Danielle Matula  
Aldea LaParr  
Joe Piven, M.D.; Alternate: Deborah Zuver  
Cheryl Powell

Individual with DD-Dare  
Individual with DD-Guilford  
Parent-Wake  
Individual with DD-Guilford  
Agency: DHHS-Aging & Adult Services-Wake  
Individual with DD-Sampson  
Parent-Pitt  
Legislative Representative-Orange  
Dept. of Public Safety-Orange  
Agency: DHHS-W/C Health-Wake  
Individual with DD-Wayne  
Agency: Carolina Institute on DD-Orange  
Individual with DD-New Hanover

***Staff: Melissa Swartz***

**STAFF**

Vacant  
Cora Gibson  
David Ingram  
Melissa Swartz  
JoAnn Toomey  
Yadira Vasquez  
Shar'ron Williams  
Travis Williams  
Philip Woodward  
Letha Young

Executive Director  
Administrative Specialist II  
Systems Change Manager  
Systems Change Manager  
Director of Operations  
Business Officer  
Business Services Coordinator  
Systems Change Manager  
Systems Change Manager  
Administrative Specialist I



**Meeting: NC Council on Developmental Disabilities**  
**Location: Hilton Garden Inn, Cary, NC**

**DRAFT**  
**AGENDA**  
**THURSDAY, AUGUST 8, 2019**  
**BRADFORD C & D**

- 8:30 - 9:00 AM **WELCOME**.....**Alex McArthur, NCCDD Chair**
- 9:00 - 10:30 AM **MEMBER DEVELOPMENT**  
 ~RFA Research/Future Investments Update  
 ~Kelly Woodall-ADA Training  
 ~Five-Year Plan Update  
 ~Member Recognition
- 10:30 - 11:00 AM **BREAK**
- 11:00 - 12:00 PM **POLICY UPDATE**.....**Erika Hagensen and Jill Hinton, NCCDD Policy Coordinators**
- 12:00 - 1:00 PM **LUNCH** (Buffet Lunch Provided)\*
- 1:00 - 2:00 PM **CONTINUATION FUNDING REQUESTS**  
**Advocacy Development Committee:**  
 ~NC ADA Network/Fiscal Intermediary Continuation Funding Request  
 .....**Karen Hamilton, Community Enterprises**  
 ~Leadership Development Training Continuation Funding Request  
 .....**Corye Dunn, Disability Rights NC**  
**Cross Cutting Initiatives:**  
 ~NCCDD Communications Continuation Funding Request  
 .....**Devika Rao, O’Neill Communications and Jayke Hamill, Center for Creative Leadership**
- 2:00 - 2:30 PM **BREAK**
- 2:30 - 5:00 PM **COMMITTEE MEETINGS**  
 Advocacy Development.....Bradford A  
 Community Living.....Bradford B  
 Financial Asset Development.....Bradford C
- 5:00 - 5:30 PM **BREAK**
- 5:30 - 8:00 PM **MEMBER RECEPTION** (Buffet Dinner Provided)\*  
 ~Medicaid Transformation Presentation  
 .....**Dave Richard, Deputy Secretary and Sandra Terrell, Director of Clinical Services-NC Medicaid; and Gina Padilla, Vice President-Maximus**

\*Council meetings are open to the public. However, we are a federally-funded program and cannot reimburse individuals who are not Council members or invited guests for transportation, meals, lodging, etc. Meals that are included in the agenda are for Council members and invited guests and cannot be provided to members of the public due to budgetary constraints.



**Meeting: NC Council on Developmental Disabilities**  
**Location: Hilton Garden Inn, Cary, NC**

**DRAFT**  
**AGENDA**  
**FRIDAY, AUGUST 9, 2019**  
**BRADFORD CID**

- 8:30 - 9:00 AM **WELCOME, CONFLICT OF INTEREST & SAFETY AND PREPAREDNESS**.....Alex McArthur
- 9:00 - 9:10 AM **ROLL CALL**.....Aldea LaParr
- 9:10 - 9:15 AM **APPROVAL OF MINUTES**.....Aldea LaParr
- 9:15 - 9:30 AM **DIRECTOR UPDATE/REPORT**.....Alex McArthur
- 9:30 - 9:40 AM **FINANCIAL REPORT**.....Alex McArthur
- 9:40 - 10:00 AM **LEGISLATIVE UPDATE**.....Representative Insko/Senator Mohammed
- 10:00 - 10:15 AM **PUBLIC COMMENT\***.....Alex McArthur
- 10:15 - 10:45 AM **BREAK**
- 10:45 - 11:30 AM **COMMITTEE REPORTS**  
 Executive Committee.....Alex McArthur  
 Advocacy Development.....Nessie Siler  
 Community Living.....Kerri Eaker  
 Financial Asset Development.....Amanda Bergen
- 11:30 - 12:25 PM **NEW BUSINESS**  
 ~Approval of NCCDD Communications Initiative  
 ~Approval of 2020 Council Meeting Dates  
 ~Five-Year State Plan/Ad Hoc Committee Update  
 ~DD Network Partners-Update  
     Disability Rights NC  
     Carolina Institute for Developmental Disabilities  
     NC Empowerment Network
- 12:25 - 12:30 PM **OLD BUSINESS**
- 12:30 PM **ADJOURN**

\*The North Carolina Council on Developmental Disabilities (NCCDD) is committed to offering members of the general public an opportunity to make public comments. NCCDD members who would like to comment during this period of the meeting must be recognized by the Council Chair and are limited to three minutes per speaker.

# Council Minutes



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



**DRAFT**

**NC COUNCIL ON DEVELOPMENTAL DISABILITIES**

**www.nccdd.org**

**Quarterly Council Meeting Minutes  
Courtyard Marriott, Carolina Beach, NC**

**May 10, 2019**

**MEMBERS PRESENT:** Amanda Bergen, Katherine Boeck, Bryan Dooley, Kathie Trotter (for Chris Egan), Kerri Eaker, Mary Edwards, Myron Gavin, Joshua Gettinger, Brendon Hildreth, Katie Holler, Jamila Little (for Gary Junker), Kelly Kimple, Virginia Knowlton Marcus, Aldea LaParr, Mya Lewis (for MH/DD/SAS), Kristy Locklear, Senator Mujtaba Mohammed, Deb Zuver (for Joseph Piven), Cheryl Powell, Ryan Rotundo, Nessie Siler, Dan Smith, Teresa Strom (for DSS), Sherry Thomas, Kelly Woodall

**MEMBERS ABSENT:** Dawn Allen, Eric Chavis, Nakima Clark, Anna Cunningham, Allison Dodson, Christina Dupuch, Jason Faircloth, Rep. Verla Insko, Alex McArthur, Will Miller, Wing Ng, Dave Richard, James Stephenson, Peggy Terhune, Sandra Terrell

**STAFF PRESENT:** Cora Gibson, David Ingram, Melissa Swartz, JoAnn Toomey, Yadira Vasquez, Shar'ron Williams, Travis Williams, Philip Woodward, Letha Young

**CONTRACTORS/GRANTEES PRESENT:** Devika Rao

**GUESTS:** Brian Beauchamp, Darcy Hildreth, David Owens

**WELCOME AND ATTENDANCE**

In the absence of Chair Alex McArthur, Myron Gavin and Cheryl Powell, NCCDD Co-Chairs, welcomed the members and opened the meeting. Myron asked that 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. She also reminded members of the emergency exits at the Courtyard Marriott. She thanked the members for their participation on Thursday.

Aldea LaParr, NCCDD Secretary, conducted the roll call.

**APPROVAL OF COUNCIL MINUTES**

Aldea LaParr asked for approval of the February Council meeting minutes. A copy of the minutes had previously been made available to Council members.

**MOTION:** Nessie Siler made a motion to approve the February 2019 Council meeting minutes. Katie Holler seconded the motion. The motion was approved by unanimous vote.

## **FINANCE REPORT**

Cheryl Powell reminded members to complete their reimbursement forms and submit them to staff. She gave a brief report on the financial status of the Council. A copy of the report had previously been made available and reviewed with Council members. The following motion was presented on the floor for Council consideration:

**MOTION:** Mary Edwards made a motion to approve the 2019-2020 Administrative budget for \$575,282 federal funds and \$89,393 state funds, for a total Administrative budget of \$664,675; and to approve the 2019-2020 Program budget for \$549,329 federal funds. Kerri Eaker seconded the motion. The motion was approved by unanimous vote.

## **LEGISLATIVE UPATE/PUBLIC POLICY**

Newly appointed Council member Senator Mujtaba Mohammed gave a Legislative update and provided information on the Medicaid budget and upcoming Bills to the floor.

## **PUBLIC COMMENT**

JoAnn Toomey thanked the members for their support and wanted to assure them that although NCCDD staff want and need a new Executive Director, the staff are continuing to work well as a team and are getting the work done that needs to be done.

Joshua Gettinger updated the members on the opening of a primary care facility for persons with I/DD in the western part of the state.

## **COMMITTEE REPORTS**

Myron Gavin requested presentation of committee reports. Please refer to the committee minutes for a detailed description of the committee's work, including motions made in committee.

## **EXECUTIVE COMMITTEE**

The Executive Committee members met February 25, 2019, March 18, 2019 and April 15, 2019. Copies of the minutes were made available to Council members and Myron asked members to review the minutes and let them know that the minutes are also posted on the NCCDD website.

## **COMMUNITY LIVING COMMITTEE**

Committee Chair Kerri Eaker presented the Community Living Committee report. She thanked all committee members and staff and gave a brief update on the discussions from the Thursday meeting and initiative updates that were presented to the committee. The following motion was presented on the floor for Council consideration:

**MOTION:** Kerri Eaker made a motion to direct staff to explore transportation, fair affordable housing and making alternatives to guardianship a reality in NC as potential future initiatives. Katherine Boeck seconded the motion. The motion was approved by unanimous vote.

#### **FINANCIAL ASSET DEVELOPMENT COMMITTEE**

Committee Chair Amanda Bergen presented the Financial Asset Development Committee report. She thanked all committee members and staff and gave a brief update on the discussions from the Thursday meeting and initiative updates that were presented to the committee. The following motion was presented on the floor for Council consideration:

**MOTION:** Dan Smith made a motion to direct staff to explore benefit counseling expansion, community college programming that is not TPSID (Transition and Postsecondary Programs for Students with Intellectual Disability), and parent/peer workbook related to transitions as potential future initiatives. Joshua Gettinger seconded the motion. The motion was approved by unanimous vote.

#### **ADVOCACY DEVELOPMENT COMMITTEE**

Committee Chair Nessie Siler presented the Advocacy Development Committee report. She thanked all committee members and staff and gave a brief update on the discussions from the Thursday meeting and initiative updates that were presented to the committee. The following motion was presented on the floor for Council consideration:

**MOTION:** Katherine Boeck made a motion to direct staff to explore justice (the right to transition into and live in the community free from abuse, neglect, discrimination, exploitation or assault, with the supports and services necessary to thrive), education system/early childhood intervention and aging caregivers. Katie Holler seconded the motion. The motion was unanimously approved.

#### **NEW BUSINESS**

Myron Gavin reminded the members that they all need to start thinking about the process, listening sessions and any potential new goals and objectives for the next Five-Year State Plan that will begin October 1, 2021.

#### **DEVELOPMENTAL DISABILITIES NETWORK PARTNERS UPDATES**

Virginia Knowlton Marcus shared some of Disability Rights North Carolina updates on their recent conference, conducting different investigations and how they are keeping up with the new legislative changes and policies.

Deb Zuver, Carolina Institute for Developmental Disabilities, gave updates on the School of Social Work on-line training, new positions and upcoming conferences.

Cheryl Powell shared an update on the advancement of the NC Empowerment Network.

#### **OLD BUSINESS:**

No old business to report.

**ADJOURN**

Myron Gavin asked for a motion to adjourn the meeting.

**MOTION:** Kelly Woodall Beauchamp made a motion to adjourn the May 2019 meeting. Katherine Boeck seconded the motion. The motion was approved by unanimous vote.

Approved: \_\_\_\_\_  
Aldea LaParr, Secretary

Date: \_\_\_\_\_

# Executive Committee



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



## NC Council on Developmental Disabilities

**DRAFT**

### Executive Committee Minutes

Date: July 15, 2019

Time: 10:00 AM – 11:00 AM

**Members Present:** Amanda Bergen, Kerri Eaker, Myron Gavin, Aldea LaParr, Alex McArthur, Cheryl Powell, Nessie Siler

**Staff Present:** David Ingram, JoAnn Toomey, Yadira Vasquez

#### I. Call to Order

Chair Alex McArthur opened the meeting of the Executive Committee (EC) and welcomed the members calling in. She reminded the members that staff were on the line and that they would not be having a closed session of the EC to discuss personnel matters today, but she did share that the NCCDD staff would be interviewing the EC's two Executive Director candidates next Monday, July 22<sup>nd</sup> by Zoom.

#### II. Approval of Minutes

The draft minutes of the June 17, 2019 Executive Committee meetings were reviewed.

**MOTION:** Cheryl Powell made a motion to approve the June 17, 2019 minutes. Aldea LaParr seconded the motion. The motion was approved by unanimous vote.

#### III. Financial Report and Expenses/Match Update

Yadira Vasquez reviewed the financial reports for the NCCDD. Currently, there is an estimated amount of \$242,500 available for new initiatives effective October 1, 2019 from FFY 2020. All other funds for FFYs 2017-2020 have been identified to be spent, pending Council approval.

Cheryl Powell announced that she sent in the EIN paperwork to the IRS again by certified mail and that she and Melissa are checking the IRS website daily for an update. She said that recent calls have been unsuccessful.

Alex asked if there was an update on the Leadership Development Training initiative. Cheryl said she and JoAnn Toomey called in to the Advisory Committee's meeting that was held in Greensboro on June 28<sup>th</sup> and that she felt optimistic about the progress. JoAnn shared that Melissa Swartz attended that meeting and that Melissa said she was pleased with Corye Dunn's and the Center for Creative Leadership's (CCL) participation and presentations at the meeting. However, a recent development was CCL declining Disability Rights NC's (DRNC) request for CCL to take over the administrative and reporting functions of this initiative. Melissa has followed up with DRNC staff and suggested some other options to pursue. Alex asked

that the EC be given an update at least a week before the August Council meeting when DRNC will be presenting their update for continuation funding of Year 2. Kerri Eaker said that at the NACDD conference last week she heard from other states about leadership training initiatives they have been involved with and she will share that information with Melissa.

Alex asked if the members had any other questions and there were none.

#### **IV. Council Meeting/Member Survey or Agenda Review**

The members reviewed and discussed ideas for the draft agenda for the August Council meeting. Several edits were made and the draft agenda will be ready to include in the August mailout.

Council meeting dates for 2020 were again reviewed and after hearing about the research of hotels in Greensboro or Winston-Salem by Cora Gibson, the members agreed that the May 2020 Council meeting should be in Winston-Salem.

**MOTION:** Nessie Siler made a motion to approve the Council meeting dates for 2020 of February 6 & 7, May 7 & 8 (in Winston-Salem), August 6 & 7 and November 4, 5 & 6, 2020. Myron Gavin seconded the motion. The motion was approved by unanimous vote.

#### **V. Conference Funding Requests**

The members reviewed a request for the 2020 Rooted in Advocacy Conference (hosted by the Arc of North Carolina) being held on March 13, 2020 at Benton Convention Center, Winston-Salem. The request is for up to \$3,000. It will cover the cost of the meeting space for this conference.

**MOTION:** Kerri Eaker made a motion to approve funding to the Arc of North Carolina for the 2020 Rooted in Advocacy Conference being held March 13, 2020 in Winston-Salem in the amount of \$3,000. Cheryl Powell seconded the motion. The motion was approved unanimously.

The members then reviewed a request for the 2<sup>nd</sup> Annual Hub for Autism & Neurodiversity Conference (hosted by the Hub for Autism & Neurodiversity (HANd)) being held on September 27, 2020 at Alliance Bible Fellowship, Boone. The request is for up to \$1,162.50. It will cover the costs to fund up to 1 speaker's travel and fee and the venue cost for the conference.

**MOTION:** Aldea LaParr made a motion to approve funding to the Hub for Autism & Neurodiversity for the 2<sup>nd</sup> Annual HANd Conference being held September 27, 2020 in Boone in the amount of \$1,162.50. Myron Gavin seconded the motion. Kerri Eaker recused herself from the vote as she is on the HANd Advisory Council. The motion was approved unanimously.

**VI. Personal Services Contract Review/Approval**

None at this time.

**VII. Ad Hoc Committees/Updates**

David Ingram said that he sent out an email invite to the former members of the Five-Year State Plan Ad Hoc Committee to ask if they would still be interested in serving this committee. So far Mya Lewis and Kerri Eaker replied that they would serve. Cheryl Powell offered to join and Alex McArthur asked to also be put on the emails for this group and would attend when she could. The first meeting is scheduled for Tuesday, July 30, 2020 from 3:00-4:00 PM, by teleconference (original date stated of Friday, July 26<sup>th</sup> was in error).

**VIII. Other**

JoAnn Toomey updated the members regarding two Idea Portal submissions that were received in June. The Systems Change Managers had completed a thorough review process for both and after reviewing their recommendations, she agreed with the consensus that rejection letters be sent with an invitation to keep checking our website for new RFA opportunities and to refer them to current initiatives and other agencies as identified in their summary review. The members also agreed with this recommendation.

Alex asked if the members had any other agenda items to discuss and Amanda Bergen asked that the draft minutes from the May, 2019 Financial Asset Development Committee be sent to her (sent 7/16/19); Cheryl Powell said that the NCEN funds being held by DRNC have been successfully transferred to an accounting firm that also serves the Alliance for Disability Advocates and Kerri Eaker announced that the next Sibling Conference will be held on July 27<sup>th</sup> in Asheville and that 25 people have already registered.

**IX. Adjourn**

Alex McArthur asked for a motion to adjourn before going into a closed session of the Executive Committee to discuss the Executive Director hiring process.

**MOTION:** Amanda Bergen made a motion to adjourn the meeting. Nessie Siler seconded the motion. The motion was approved and the meeting adjourned.

## NC Council on Developmental Disabilities

**FINAL**

### Executive Committee Minutes

Date: June 17, 2019

Time: 10:00 AM – 11:00 AM

**Members Present:** Amanda Bergen, Kerri Eaker, Myron Gavin, Alex McArthur, Cheryl Powell, Nessie Siler

**Members Absent:** Aldea LaParr

**Staff Present:** David Ingram, Melissa Swartz, JoAnn Toomey, Yadira Vasquez

#### I. **Call to Order**

Chair Alex McArthur opened the meeting of the Executive Committee (EC) and welcomed the members calling in.

#### II. **Approval of Minutes**

The draft minutes of the May 20, 2019 Executive Committee meetings were reviewed.

**MOTION:** Amanda Bergen made a motion to approve the May 20, 2019 minutes. Kerri Eaker seconded the motion. The motion was approved by unanimous vote.

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

Yadira Vasquez reviewed the financial reports for the NCCDD. Currently, there is an estimated amount of \$242,500 available for new initiatives effective October 1, 2019 from FFY 2020. All other funds for FFYs 2017-2020 have been identified to be spent, pending Council approval.

Alex McArthur thanked Yadira for the concise fiscal presentation and asked if all staff were aware of any delays with reports and Yadira explained that all initiatives were reviewed at the weekly staff meetings. Alex asked if the members had any other questions and there were none.

#### IV. **Council Meeting/Member Survey or Agenda Review**

The members reviewed and discussed ideas for the draft agenda for the August Council meeting. Several edits were made and the draft agenda will be reviewed again at the July meeting.

Council meeting dates for 2020 were discussed and the members agreed that the May 2020 Council meeting should be in either Greensboro or Winston-Salem. They asked that Cora Gibson explore venues in both cities and let them know the results at the July meeting. They will then approve the dates and locations to be recommended to the full Council in August.

#### V. **Conference Funding Requests**

None at this time.

**VI. Personal Services Contract Review/Approval**

None at this time.

**VII. Ad Hoc Committees/Updates**

None at this time.

**VIII. Other**

JoAnn Toomey updated the members regarding an Idea Portal Proposal that was received in May. The Systems Change Managers had completed a thorough review process and after JoAnn reviewed their recommendations, agreed with the consensus that a rejection letter be sent with an invitation to keep checking our website for new RFA opportunities and to refer them to current initiatives for potential inclusion in the registered apprenticeships and/or Pre-ETS activities. The members also agreed with this recommendation.

David Ingram discussed the restoration of the State Plan Ad Hoc Committee to initiate development activities involving stakeholder surveys and statewide listening sessions for the next Five-Year State Plan. The members agreed that David should contact the previous members involved, but that there appeared to be a need to include Council members from the east and gave several suggestions. A goal is that the committee can convene before the August Council meeting.

The members reviewed the applications for membership that had been sent to them earlier regarding upcoming reappointments and vacancies. They approved 10 applications to be forwarded to Boards and Commissions as options for appointment with 2 applications being highly recommended; all applications forwarded had been on file for membership to NCCDD; all either diverse in demographic location or ethnicity.

Cheryl Powell updated the members on the progress of the Leadership Development Training initiative. In Alex's absence, she called in to a meeting on June 12<sup>th</sup> that was held at the NCCDD office with Corye Dunn, Susan McLean and Virginia Knowlton Marcus, as well as Melissa Swartz and JoAnn Toomey and that meaningful steps have been taken to lay the groundwork for this important opportunity. They continue to be excited about convening the advisory committee and stated that they are committed to the success of this initiative. However, they admitted that Center for Creative Leadership is better prepared for the administrative and reporting functions of the contract and they have reached out to them to explore this possibility. Disability Rights NC will continue to hold the contract and disperse the funding, but with some budget amendments within the contract, CCL will take over the bulk of the administrative and reporting functions. Melissa Swartz stated that she felt comfortable with this progress to release for payment DRNC's April Request for Reimbursement.

The Executive Committee was pleased to hear this progress but will continue to want monthly progress reports. Considering DRNC requesting continuation funding at the August Council meeting, they'll expect to get an update at their July meeting that reports on the advisory committee and CCL's commitment regarding the administrative and reporting functions the will truly meet the scope of work obligations of this initiative.

Cheryl Powell updated the members on the NC Empowerment Network (NCEN) initiative. She stated that they are still waiting to receive the EIN from the IRS and was confident that they would not receive it in time for the July 1<sup>st</sup> start date of this NCCDD initiative. While disappointed for the NCEN that there was a delay, the Executive Committee members discussed making a motion to push out the start date for when all paperwork is completed and received.

**MOTION:** Kerri Eaker made a motion to approve delaying the start date of the NC Empowerment Network (NCEN) initiative from July 1, 2019 to the 1<sup>st</sup> day of the month following NCEN's obtaining their federal EIN and any other documents that are required in order to enter into a contract with state entities. Amanda Bergen seconded the motion. Cheryl Powell recused herself from the vote since she is the Chairperson of the NCEN. The motion was approved by unanimous vote.

**IX. Adjourn**

Alex McArthur asked for a motion to adjourn before going into a closed session of the Executive Committee to discuss the Executive Director hiring process.

**MOTION:** Amanda Bergen made a motion to adjourn the meeting. Nessie Siler seconded the motion. The motion was approved and the meeting adjourned.

# NC Council on Developmental Disabilities

**FINAL**

## Executive Committee Minutes

Date: May 20, 2019

Time: 10:00 AM – 11:00 AM

**Members Present:** Amanda Bergen, Kerri Eaker, Aldea LaParr, Alex McArthur, Cheryl Powell, Nessie Siler

**Members Absent:** Myron Gavin

**Staff Present:** Melissa Swartz, JoAnn Toomey, Yadira Vasquez, Letha Young

### I. Call to Order

Chair Alex McArthur opened the meeting of the Executive Committee (EC) and welcomed the members calling in.

### II. Approval of Minutes

The draft minutes of the April 15, 2019 Executive Committee meeting were reviewed.

**MOTION:** Aldea LaParr made a motion to approve the April 15, 2019 minutes. Amanda Bergen seconded the motion. The motion was approved by unanimous vote.

### III. Council Meeting/Member Survey Review

The members reviewed the six electronic survey submissions with three comments and the one paper copy received. They all agreed that even though Alex was missed, Cheryl and Myron made a good team and did a great job leading the May Council meeting in Carolina Beach. The survey comments were mostly positive. All liked the extra time in committees and felt that everyone participated and had the time to talk. The new members were engaged, and it was appreciated that there was that level of participation from them. The sound system had some glitches but overall the meeting was productive and enjoyable.

The members discussed Mark Benton, DHHS Deputy Secretary, coming to the meeting to briefly speak about the lengthy hiring process and delayed offer for the Executive Director position. They appreciated that he took the time to come to the meeting and felt the apology was sincere, but that everyone needed to accept it and move on now. They all agreed that the process needs to speed up and Cheryl shared that some EC members met after the meeting Thursday and said they'll plan to rank the applicants and then interview three candidates on the same day. The questions and process are ready to begin, and JoAnn Toomey said she will forward the applications and a

new ranking sheet next week to the members since the posting closed on Friday, May 17<sup>th</sup>.

**IV. Conference Funding Requests**

None at this time.

**V. Personal Services Contract Review/Approval**

None at this time.

**VI. Ad Hoc Committees/Updates**

None at this time.

**VII. Other**

Nessie Siler gave an update on the Leadership Development Training initiative and the members had a lengthy discussion on the progress, as well as the lack of progress. Melissa Swartz recommended a meeting with DRNC to discuss the possibility of awarding a sub-contract for a dedicated contract administrator. She mentioned that the knowledge, creativity and implementation is there, but administration of the contract is still not acceptable, especially around programmatic reporting. The members agreed that a more thorough update will be expected at the next EC meeting on June 17<sup>th</sup>.

Alex McArthur updated the members on the Advocacy & Leadership Awards and that the nomination forms will be posted on the website by June 30<sup>th</sup> with a deadline of August 5<sup>th</sup>. The EC will review the nominations at their September 16<sup>th</sup> meeting and choose the winners at that time.

**VIII. Adjourn**

Alex McArthur asked for a motion to adjourn.

**MOTION:** Cheryl Powell made a motion to adjourn the meeting. Nessie Siler seconded the motion. The motion was approved and the meeting adjourned.

## NC Council on Developmental Disabilities

**FINAL**

### Executive Committee Minutes

Date: April 15, 2019

Time: 10:00 AM – 11:00 AM

**Members Present:** Amanda Bergen, Kerri Eaker, Myron Gavin, Aldea LaParr, Alex McArthur, Cheryl Powell, Nessie Siler

**Staff Present:** JoAnn Toomey, Yadira Vasquez

#### I. **Call to Order**

Chair Alex McArthur opened the meeting of the Executive Committee (EC) and welcomed the members calling in.

#### II. **Approval of Minutes**

The draft minutes of the March 18, 2019 Executive Committee meetings were reviewed.

**MOTION:** Aldea LaParr made a motion to approve the March 18, 2019 minutes. Amanda Bergen seconded the motion. The motion was approved by unanimous vote.

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

Yadira Vasquez reviewed the financial reports for the NCCDD. Currently, there is an estimated amount of \$242,500 available for new initiatives effective October 1, 2019 from FFY 2020. All other funds for FFYs 2017-2020 have been identified to be spent, pending Council approval.

Yadira also reviewed the proposed 2019-2020 Administrative and Program Budgets that will be presented to the Council for approval at the May meeting. Alex McArthur thanked Yadira for the concise presentation of the budgets and asked if the members had any questions and there were none.

#### IV. **Council Meeting/Member Survey or Agenda Review**

The members reviewed and discussed the draft agenda for the May Council meeting in Carolina Beach. Alex expressed her regret that she will not be able to attend the May meeting and appreciated Cheryl and Myron taking over. JoAnn Toomey reviewed the panel presenter list and thanked the Systems Change Managers for the work they've done to make this a success for the May meeting.

#### V. **Conference Funding Requests**

None at this time.

#### VI. **Personal Services Contract Review/Approval**

JoAnn advised the members that she will be completing Personal Services Contracts for the Council's two policy coordinators for \$30,000 each for the total of \$60,000 that was approved at the February Council meeting for the period of July 1, 2019 to June 30, 2020.

**VII. Ad Hoc Committees/Updates**

None at this time.

**VIII. Other**

JoAnn updated the members regarding an Idea Portal Proposals that was received in March. The Systems Change Managers had completed a thorough review process and after JoAnn reviewed their recommendations, agreed with the consensus that a rejection letter be sent with an invitation to keep checking our website for new RFA opportunities and to refer them to Governor Cooper's Executive Order 92: Employment First for North Carolinians with Disabilities. The members also agreed with this recommendation.

Alex updated the members on the progress of the Leadership Development Training initiative. She shared that she had been in contact with Corye Dunn and Virginia Knowlton Marcus and that meaningful steps have been taken to lay the groundwork for this important opportunity. They are excited about convening the advisory body and they are also seeking to add a member who is connected within the Latinx community in NC. JoAnn let the members know that CCL did invoice Disability Rights NC (DRNC) for work completed and DRNC submitted a March Request for Reimbursement to us for just over \$19,000.

Bryan Dooley and Ryan Rotundo have requested to attend the NACDD conference in New Orleans July 9-11, 2019 and Alex asked for a motion to approve.

**MOTION:** Cheryl Powell made a motion to approve Bryan Dooley and Ryan Rotundo to attend the NACDD conference in New Orleans, LA, July 9-11, 2019. Nessie Siler seconded the motion. The motion was approved by unanimous vote.

**IX. Adjourn**

Alex McArthur asked for a motion to adjourn.

**MOTION:** Kerri Eaker made a motion to adjourn the meeting. Aldea LaParr seconded the motion. The motion was approved and the meeting adjourned.

# Advocacy Development Committee



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



North Carolina Council on  
Developmental Disabilities

**Advocacy Development Committee Agenda**

August 8, 2019

2:30 p.m. – 5:00 p.m.

Hilton Garden Inn, Cary, NC

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<b>2:30 p.m. – 2:40 p.m.</b>	<b>Introductions</b> <ul style="list-style-type: none"><li>• Welcome! Recognition: Eric Chavis</li><li>• Guide to Productive Meeting</li><li>• Approval of May Minutes</li></ul>	<i>Nessie Siler, Chair</i>
<b>2:40 p.m. – 3:20 p.m.</b> 2:40 - 3:00 3:00 - 3:20	<b>Continuation Funding</b> <ul style="list-style-type: none"><li>• Inclusive Leadership Development Training</li><li>• NC ADA Network Coordination, Technical Assistance and Fiscal Intermediary</li></ul>	<i>Corye Dunn, Coordinator</i> <i>Karen Hamilton, Coordinator</i>
<b>3:20 p.m. – 3:30 p.m.</b>	<b>Initiative Updates</b> <ul style="list-style-type: none"><li>• NC Empowerment Network</li></ul>	<i>Nessie Siler</i> <i>Cheryl Powell, President</i>
<b>3:30 p.m. – 3:40 p.m.</b>	<b>Fiscal Update</b>	<i>Yadira Vasquez, Staff</i>
<b>3:40p.m. – 4:50 p.m.</b>	<b>Future Investments / Request to Draft RFA(s)</b> <ul style="list-style-type: none"><li>• Justice</li><li>• Education System/Early Childhood Intervention</li><li>• Aging caregivers</li></ul>	<i>Nessie Siler</i> <i>Melissa Swartz, Staff</i> <i>Committee Members</i>
<b>4:50 p.m. – 5:00 p.m.</b>	<b>Wrap Up and Reminders</b> <ul style="list-style-type: none"><li>• Completion of Financial Forms</li><li>• Reminder November 6, 7, &amp; 8, 2019 Council meeting at Hilton Garden Inn, Cary NC</li></ul>	

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**ADVOCACY DEVELOPMENT COMMITTEE**

Nessie Siler, Chair

Eric Chavis

NaKima Clark

Bryan Dooley

Mary Edwards; Alternate: Joseph Breen

Jason Faircloth

Katie Holler

Representative Verla Insko

Gary Junker, Ph.D.; Alternate: Jamila Little

Kelly Kimple, M.D.; Alternate: Danielle Matula

Aldea LaParr

Joe Piven, M.D.; Alternate: Deborah Zuver

Cheryl Powell

Individual with DD-Dare

Individual with DD-Guilford

Parent-Wake

Individual with DD-Forsythe

Agency: DHHS-Aging & Adult Services-Wake

Individual with DD-Sampson

Parent-Pitt

Legislative Representative-Orange

Dept. of Public Safety-Orange

Agency: DHHS-W/C Health-Wake

Individual with DD-Wayne

Agency: Carolina Institute on DD-Orange

Individual with DD-New Hanover

Staff: Melissa Swartz

**Advocacy Development Committee**  
**DRAFT MINUTES**  
**Thursday, May 9, 2019**  
**2:00pm - 5:00pm**  
**Marriott Courtyard, Carolina Beach, NC**

**Members Present:** Bryan Dooley, Mary Edwards, Katie Holler, Kelly Kimple, Aldea LaParr, Jamilla Little, Cheryl Powell, Nessie Siler, Deborah Zuver

**Members Absent:** NaKima Clark, Eric Chavis, Jason Faircloth, Rep. Verla Insko

**Staff in Attendance:** Melissa Swartz, Yadira Vasquez, Letha Young

**Guests:** Corye Dunn, Karen Hamilton, Dave Owen, Francesca (member DSP)

**Welcome/Introductions:**

The Advocacy Development Committee started with self-introductions and welcomed members.

**Approval of Minutes:**

Cheryl Powell made a motion to approve the February 2019 Advocacy Development Committee (ADC) minutes. Aldea LaParr seconded the motion. The motion was approved.

**Status Update: Inclusive Leadership Development Training Initiative:**

Corye Dunn, Policy Director of Public Policy at DRNC and Leadership Development Training initiative coordinator provided a status update on initiative activities and next steps. A one-page description entitled Project Discovery for the Ability Leadership Project was provided to ADC members.

- The first objective is to establish an advisory council that will guide the training curriculum development. Three advisory council members have confirmed participation and two are pending.
- The 1<sup>st</sup> on boarding training session is scheduled for May 31<sup>st</sup> at the Holiday Inn Greensboro.
- The Welcome package for the “on-boarding training” is scheduled to be complete by May 21<sup>st</sup>.

Training materials accessibility standards were confirmed. Both DRNC and NCCDD staff committed to monitoring this closely, including sharing initiative materials between council meetings with ADC members.

**Initiative Update NC ADA Network Coordination, Technical Assistance and Fiscal Intermediary:**

Karen Hamilton provided an initiative update on the ADA Network Coord/TA/FI initiative. The initiative is making progress according to and exceeding the contracted scope of work.

**Initiative Update NC Empowerment Network:**

Cheryl Powell provided an initiative update about the NC Empowerment Network. The initiative is making progress according to its scope of work.

### **Future investments**

Committee members provided staff permission to pursue the following topics: Justice, Early Childhood Intervention/Education System, and Aging Caregivers. Cross-cutting features of these topics to consider, respectively, include accessible terminology (a.k.a. plain language approaches), cultural competence/cultural diversity – including disability history – and technology.

### **Topic Detail Included:**

- **Justice\*** – transition back into community; sexual assault/safe place; Sexual Violence/Domestic Violence project expansion; and crisis prevention/intervention training including law enforcement and correctional. *\*On Friday May 10, the full council narrowed this topic to: the right to transition into and live in the community free from abuse, neglect, discrimination, exploitation or assault, with the supports and services necessary to thrive.*
- **Education System/Early Childhood Intervention** – Child and family centered; parents get on-going resources with emphasis on child getting off to a good start; education for teachers and providers; Special needs advisory committee; and more and better information for transition coordinators
- **Aging Caregivers** – for example, refer to the Administration for Community Living Supports for family caregivers across the lifespan February 2019: The National Family Caregiver Support Program; and Aging and Disability Resource Centers; and Lifespan respite care programs

**Adjournment:** Motion to adjourn was made by Mary Edwards. The motion was seconded by Cheryl Powell. The motion was approved.

# North Carolina Council on Developmental Disabilities

## Community Living Committee Agenda

August 8, 2019

2:30 p.m. – 5:00 p.m.

Hilton Garden Inn, Cary, NC

<b>2:30 p.m. – 2:45 p.m.</b>	<b>Introduction</b> <ul style="list-style-type: none"> <li>• Welcome</li> <li>• Approval of May minutes</li> <li>• Member Development Activity</li> </ul>	<i>Kerri Eaker, Chair</i>
<b>2:45 p.m. – 2:55 p.m.</b>	<b>Fiscal Report</b>	<i>Yadira Vasquez, Staff</i>
<b>2:55 p.m. – 3:10 p.m.</b>	<b>Initiative Updates</b> <ul style="list-style-type: none"> <li>• From Planning to Action: Integrated, Collaborative Care for People with I/DD</li> </ul>	<i>Karen Luken, The Arc of NC</i>
<b>3:10 p.m. – 3:25 p.m.</b>	<ul style="list-style-type: none"> <li>• Rethinking Guardianship: A Person-Centered Approach</li> </ul>	<i>Linda Kendall Fields, The Jordan Institute for Families</i>
<b>3:25 p.m. – 3:40 p.m.</b>	<ul style="list-style-type: none"> <li>• Supported Living: Making the Difference</li> </ul>	<i>Jesse Smathers, Vaya Health</i>
<b>3:40 p.m. – 3:55 p.m.</b>	<ul style="list-style-type: none"> <li>• Natural Support Network Development</li> </ul>	<i>Janet Price-Ferrell, FIRST</i>
<b>3:55 p.m. – 4:55 p.m.</b>	<b>Future Investments Discussion</b> <ul style="list-style-type: none"> <li>• Transportation</li> <li>• Fair, Affordable Housing</li> <li>• Making Alternatives to Guardianship a Reality in North Carolina</li> </ul>	<i>Kerri Eaker, Chair Philip Woodward, Staff</i>
<b>4:55 p.m. – 5:00 p.m.</b>	<b>Wrap Up and Reminders</b> <ul style="list-style-type: none"> <li>• Completion of Financial Forms</li> <li>• Reminder: Next Council meeting – <ul style="list-style-type: none"> <li>◦ November 6-8, Hilton Garden Inn, Cary, NC</li> </ul> </li> </ul>	<i>Kerri Eaker, Chair</i>

## COMMUNITY LIVING COMMITTEE

### Kerri Eaker, Chair

Katherine Boeck

Allison Dodson

Christina Dupuch; Alternate: Andrea Misenheimer

Joshua Gettinger, M.D.

Brendon Hildreth

Kristy Locklear

Virginia Knowlton Marcus

Mujtaba Mohammed

James Stephenson

Peggy Terhune, Ph.D.

Sandra Terrell; Alternate: Deb Goda

Vacant; Alternate: Mya Lewis

Parent-Buncombe

Individual with DD-Edgecombe

Sibling-Watauga

Non-Profit Agency-Buncombe

Parent-Buncombe

Individual with DD-Craven

Parent-Robeson

Agency: Disability Rights NC-Wake

Senator-Mecklenburg

Parent-Wake

Local Non-Governmental Agency-Randolph

Agency: DHHS-NC Medicaid-Wake

Agency: DHHS-MH/DD/SAS-Wake

**Staff: Philip Woodward**

**Community Living Committee  
DRAFT MINUTES**

Thursday, May 9, 2019

2:00 p.m. to 5:00 p.m.

Courtyard Marriott, Carolina Beach, NC

**Members Present:** Kerri Eaker, Katherine Boeck, Joshua Gettinger, Brendon Hildreth, Mya Lewis (for MH/DD/SAS), Kristy Locklear, Virginia Knowlton Marcus, Senator Mujtaba Mohammed

**Members Absent:** Allison Dodson, Christina Dupuch, James Stephenson, Peggy Terhune, Sandra Terrell

**Staff in Attendance:** JoAnn Toomey, Yadira Vasquez, Philip Woodward, Shar'ron Williams, Letha Young

**Guests:** Tim Hildreth, Karen Luken

**Introduction:**

Kerri Eaker opened the meeting welcoming the members and giving Senator Mujtaba Mohammed the opportunity to introduce himself and share his background. Kerri did a member development activity asking everyone to say one thing they decided to do while here at the beach. Karen Luken mentioned the "Intelligent Lives" film screening occurring in Wilmington.

**MOTION:** Kristy Locklear made the motion to approve the February minutes. Katherine Boeck seconded the motion. Virginia Knowlton Marcus asked if she needed to abstain because she missed February – the answer was no. The motion was approved by unanimous vote.

Yadira Vasquez gave the fiscal update. She said the Council has funding available for new initiatives: approximately \$242,500 as of October 1<sup>st</sup>, 2019 that needs to be encumbered by September 30<sup>th</sup>, 2021 and spent by September 30<sup>th</sup>, 2022.

**Initiative Updates:**

**From Planning to Action: Integrated, Collaborative Care for People with Intellectual and Developmental Disabilities (I/DD)**

Karen Luken provided an update on the Project ECHO model with UNC TEACCH and the NC Pediatric Access Line (PAL) I/DD model with Duke University. The most recent Project ECHO cohort enrolled 17 doctors, nurses, and physician's assistants, and 13 have attended on a regular basis, which is a significant time commitment. She pointed out that Project ECHO invited the Autism Society of North Carolina's Spanish-speaking parent resource specialist to participate. Meanwhile, Karen said the Duke Pediatric Care Telephone Consultation calls help link people to the I/DD service system where 69% of participants were not linked to the system. She also said the initiative did not

receive a quality family navigation proposal at the beginning, so now this initiative is focusing on family navigation through Project ECHO.

Kerri Eaker said she finds the need to connect family support to the medical community. Katherine Boeck mentioned the lack of communication between her doctors. Brendon expressed a concern about people with disabilities not advocating for themselves. Karen said the May 23<sup>rd</sup> Summit in Raleigh will emphasize the different partnerships, and the initiative will continue to focus on sustainability and advocacy.

Karen said she has been asked to present at NACDD Conference in New Orleans in July in partnership with the Cross-System Navigation in a Managed Care Environment initiative with Kerri Eaker.

### **Rethinking Guardianship: A Person-Centered Approach**

Linda Kendall Fields from the Jordan Institute for Families at UNC-Chapel Hill called in to provide an update. She gave an update on the Summit that occurred on February 25<sup>th</sup>: the room was packed, and the Rethinking Guardianship Workgroup received an award from the NC Division of Aging and Adult Services (DAAS). She said after the Summit, the Workgroup focused on the study bills in the General Assembly: House Bill 619 and Senate Bill 337. She shared that House Bill 619 passed 115-2 on Monday, May 6<sup>th</sup>, so the bill would go to the Senate, and the Workgroup noticed four changes it wants to see in the bill, so Senator Joyce Krawiec has been made aware of the desired changes. Lobbyists from Benchmarks and the American Association of Retired Persons (AARP) are working on this bill. She mentioned the challenges with getting the bill passed such as losing Judge Marion Warren of the Administrative Office of the Courts (AOC) to a new job in another state. However, she said she feels positive about where we stand now.

### **Supported Living: Making the Difference**

Jesse Smathers of Vaya Health called in to provide an update. Jesse said Vaya Health has been working on the success story video vignettes that will be shared at the closeout conference in Cary during the week of October 28<sup>th</sup>. He said changes to the Supported Living service in the Innovations Waiver are scheduled for July 1<sup>st</sup>, including the service being self-directed. He mentioned a workgroup focused on transitioning people out of institutions and announced an event on May 24<sup>th</sup> with national consultant Derrick Dufresne at the Murdoch Center in Butner. He mentioned a survey of people who are happy with Supported Living services and indicated that Michelle Merritt at the NC Division of Medical Assistance (DMA) is collecting data on the 30 people being served. He noted that close to 170 people with I/DD around the state are getting Supported Living services; of those 170, 95 people have responded to the survey, including 24 from our initiative.

### **Natural Support Network Development**

Janet Price-Ferrell called in to provide an update. The on-line course is currently in progress, and PLAN, which designed the course, has been generous extending the timeframe of the course. She said 27 people have registered, 17

are in the middle of the course, and two have completed it, including Aldea LaParr. She said the initiative will conduct an in-person training during the week of June 24<sup>th</sup> and will have specific outcomes using the Council for Quality and Leadership's Personal Outcome Measures (CQL POMs). She pointed out that, thanks to Philip, most of the videos are captioned. During June to September, they will connect with the participants virtually. Janet also said she has connected with Horizons, an intermediate care facility (ICF) in the Winston-Salem area wanting to make a change in how they serve their residents, so the facility added this curriculum to their strategic plan.

### **Future Investments / Permission to Pursue New Topics**

Katherine Boeck raised the issue of transportation, and Joshua Gettinger shared how we went through the RFA process unsuccessfully. Kristy Locklear said Mary Collier from Robeson County mentioned transportation as a barrier on the morning panel. Karen Luken mentioned how it is a big issue for the aging population and raised the possibility of having conversations with AARP, NC DAAS, and the Program of All Inclusive Care for the Elderly (PACE). Karen suggested following the Emergency Preparedness initiative's blueprint with the NC Department of Transportation (NCDOT) and having stakeholder workgroups and partners such as the Office of Rural Health and Healthy Opportunities. Brendon suggested having someone with a transportation background join the Council. Philip said former member Azell Reeves wanted to have a member appointed to the NCDOT Board of Transportation.

Kerri mentioned the issue of housing and how there is no longer a waiting list for Section 8 housing. Virginia Knowlton Marcus mentioned some affordable housing being shut down as a result of Hurricane Florence. She asked if North Carolina has a housing authority, and the answer was yes. Mya Lewis mentioned the U.S. Department of Housing and Urban Development (HUD) helping people living in institutions move to a group home. Kerri said the NCCDD is pushing for people living in the community, so the Council needs to address housing.

Senator Mohammed said transportation and housing are expensive and asked what can we do that is doable. Katherine shared the Supported Living initiative as an example, and Kerri added that, for Supported Living, we need transportation, housing, and Direct Support Professionals (DSPs). Virginia mentioned the need for people to have home modifications and organizations such as Habitat for Humanity. Karen said community colleges are promoting sustainable infrastructure and mentioned multiple ways to address the need. Mya mentioned housing as a big part of the Transitions to Community Living Initiative (TCLI). Virginia mentioned that some people with disabilities get housing before having the support in place, then they lose the housing, and then the landlord refuses to rent units to other people with disabilities.

Linda Kendall Fields called back in to discuss the Rethinking Guardianship initiative brochure, titled "An Introduction to Options," and the supported decision-making proposal titled "Making Alternatives to Guardianship a Reality in North

Carolina.” She discussed the current initiative building a bridge for future development and said the proposal came from awareness by the stakeholder workgroup. She said when she presented at the ImaginAbility Conference that Anna Cunningham organized in February, she got an hour’s worth of questions about supported decision-making. Kerri mentioned children in IEP meetings whose parents are told they need to get a guardianship and how transition planning should start closer to age 14 than 18.

Katherine brought up the issue of social isolation. Kerri mentioned her son being in a developmental bowling league on Sunday nights with no staff, so she drives her son. Kerri asked, how do we collaborate with the school system. Mya said we need to have a conversation with the NC Department of Public Instruction (DPI) if we want to discuss social isolation from a school standpoint and that it needs to start earlier in the students’ educational careers.

Advocacy Development Committee alternate member Jamila Little gave an update on the NC Department of Public Safety’s (DPS) work, and Kerri asked how can the Council support this work? Jamila mentioned reentry from the prison system and various resources available to assist with a successful reentry. Joshua asked about therapy for release, and Jamila mentioned the program that starts in prison until handoff where the probation officer helps the person make a connection with the community. Kerri mentioned people with mental health issues taking medicine in prison but not able to access it or take it regularly after release because nothing is set up to help them. Jamila said DPS has case management services.

The Community Living Committee agreed to the following three research priorities for potential future investments:

1. Transportation
2. Alternatives to Guardianship
3. Fair Housing

On the topic of alternatives to guardianship, Mya mentioned the home-based rule and advised the Council to ensure that we partner with schools to be involved with youth transitions.

Joshua asked about prison reform being in the Advocacy Development Committee or as a cross-cutting issue. Joshua mentioned Adverse Childhood Experiences (ACES), which relates to many projects. He asked, how do we make sure this happens in all venues?

### **Wrap Up and Reminders**

Katherine Boeck motioned to adjourn. Senator Mohammed seconded the motion. The meeting was adjourned at 5:05 p.m.

# Financial Asset Development Committee



**NCCDD**

North Carolina Council on  
Developmental Disabilities



# North Carolina Council on Developmental Disabilities

## Financial Asset Development Committee Agenda

August 8th, 2019

2:30 p.m. – 5:00 p.m.

Hilton Garden Inn, Cary, NC

<b>2:30 p.m. – 2:45 p.m.</b>	<b>Introduction</b> <ul style="list-style-type: none"> <li>• Welcome</li> <li>• Approval of May Minutes</li> </ul>	<i>Amanda Bergen, Chair</i>
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<b>2:45 p.m. – 3:05 p.m.</b>	<b>Initiative Updates</b> <ul style="list-style-type: none"> <li>• Update committee on Inroads to Employment Initiative</li> </ul>	<i>Beth Butler and Pat Keul, DisAbility:IN North Carolina</i>
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<b>3:05 p.m. – 3:25 p.m.</b>	<ul style="list-style-type: none"> <li>• Update on North Carolina Employment Collaborative Initiative</li> </ul>	<i>Beth Butler and Pat Keul, DisAbility:IN North Carolina</i>
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<b>3:25 p.m. – 3:45 p.m.</b>	<ul style="list-style-type: none"> <li>• Update on Project Prosperity Public Awareness and Outreach Efforts with NC Treasury, NCDVR and The Collaborative</li> </ul>	<i>Marquita Robertson, Executive Director, The Collaborative</i>
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<b>3:45 p.m. – 3:55 p.m.</b>	<b>Fiscal Report</b>	<i>Yadira Vasquez, Staff</i>
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<b>3:55 p.m. – 4:55 p.m.</b>	<b>Future Investments / Permission to Pursue New Topics Discussion</b>	<i>Amanda Bergen, Chair Travis Williams, Staff</i>
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<b>4:55 p.m. – 5:00 p.m.</b>	<b>Wrap Up and Reminders</b> <ul style="list-style-type: none"> <li>• Completion of Financial Forms</li> <li>• Reminder: Next Council meeting, November 6-8, 2019 Hilton Garden Inn, Cary</li> </ul>	<i>Amanda Bergen, Chair</i>
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Amanda Bergen, Chair  
 Dawn Allen  
 Anna Cunningham  
 Chris Egan; Alternate: Jim Swain or Kathie Trotter  
 Myron Michelle Gavin  
 William Miller  
 Wing Ng, M.D.  
 Dave Richard, Deputy Secretary, NC Medicaid  
 Ryan Rotundo  
 Daniel Smith  
 Sherry Thomas; Alternate: Dreama McCoy  
 Vacant; Alternate: Teresa Strom  
 Kelly Woodall

Parent-Mecklenburg  
 Public At Large-Stanly  
 Parent-Wake  
 Agency: DHHS-Voc. Rehabilitation-Durham  
 Parent-Craven  
 Individual with DD-Davidson  
 Parent-Wake  
 Agency: DHHS-Wake  
 Sibling-Buncombe  
 Parent-Guilford  
 Agency: Dept. Public Instruction-Wake  
 Agency: DHHS-Social Services-Wake  
 Individual with DD-Wake

Staff: Travis Williams

Financial Asset Development  
Draft Minutes  
May 9, 2019  
2:00PM-5:00PM  
Courtyard Marriott, Carolina Beach, NC

**Members Present:** Amanda Bergen, Kathy Trotter (for Chris Egan), Myron Gavin, Ryan Rotundo, Dan Smith, Teresa Strom (for DSS) Sherry Thomas (and alternate Dreama McCoy), Kelly Woodall-Beauchamp

**Members Absent:** Dawn Allen, Anna Cunningham, William Miller, Wing Ng, Dave Richard

**Guests:** Brian Beauchamp

**Staff/Contractors:** Beth Butler, David Ingram, Pat Keul, Marquita Robertson, JoAnn Toomey, Travis Williams, Yadira Vasquez

### **Introduction**

Amanda Bergen called the committee into session and reviewed the agenda and the February meeting minutes. As there was no quorum at the onset of the meeting, no vote was taken. Then, at 3:29 PM Amanda Bergen made a motion to approve the February Committee meeting minutes. Ryan Rotundo seconded the motion. The motion passed with a unanimous vote.

### **Updates**

#### **Inroads to Employment Initiative:**

Pat Keul presented to the committee an update on the three components of the Inroads to Employment initiative. For the apprenticeship component, apprenticeship one, that covers the Your Local Greens apprenticeship in Burlington NC the following was shared: In November 2018 an apprenticeship application was filed with NC Apprenticeship. In January 2019 Partners drafted the curriculum for hydroponics lesson plans/modification of horticulture lessons. In April 2019 Disability: IN North Carolina (DI-NC) received permission to add supplementary training to NCWorks Working Smart Curriculum. From May to August 2019 the contractors project to finish lesson plans and conduct student recruitment. Start of this Apprenticeship is projected for Fall 2019 or Spring 2020. Regarding apprenticeship two, the Feeding Assistance Apprenticeship at Well Spring Retirement Center, three candidates have been identified. Well Spring will hire at least two candidates this month and they plan to begin apprenticeship training in June of 2019. Activities planned for 2019-2020 include seeking a CNA program to register with NC Apprentices for the feeding assistant role. Regarding the third apprenticeship for this component, discussions are still ongoing to locate a third business partner for a third career area of focus. DI-NC has been in ongoing discussions with K-64 to expand or modify the Furniture Academy Upholstery

Apprenticeship to increase disability inclusion, as well as exploring opportunities with an automotive accessories company about a potential apprenticeship in electrical automotive services. In summary, the search continues for the third apprenticeship to be identified by the end of the second year of this initiative, February 28, 2020.

Regarding Component Two, Pre-Employments Transition Services (Pre-ETS) Program 1, DI-NC assisted Cleveland County Schools (CCS) to write and submit a proposal for a Pre-ETS grant to NC Vocational Rehabilitation in mid-April 2018. This proposal was funded and began serving students in January 2019.

Approximately 60 students will receive Pre-ETS services through the READY Program. Surveys are underway to evaluate student's perception of the impact of the program. CCS is preparing to serve over 100 students in the READY program in 2019-20.

Concerning Pre-ETS Program 2, DI-NC is currently providing technical assistance to K-64 at Catawba Vocational Community College (CVCC) in Catawba County to draft a Pre-ETS proposal to submit to NC Vocational Rehabilitation in mid-May or June 2019. The proposal will serve 3 public school systems: Catawba County Schools, Hickory Public Schools, and Newton-Conover City Schools. If awarded, funding for this program will start in January 2020 and will serve 50 plus students. DI-NC surveys will be conducted to evaluate student's perception of the impact of the program. Statistics will be gathered on the post-secondary outcomes of these students as they exit high school. CCS is preparing to serve over 100 students in the READY program in 2019-20.

Regarding Component Three for this initiative, DI-NC will be partnering with CommunAbility. CommunAbility is a mentoring program that matches business mentors to students or young adults with disabilities for mentoring sessions that take place throughout their senior year in high school, technical training, college or university. DI-NC is currently recruiting business mentors for the CommunAbility program.

#### North Carolina Employment Collaborative:

Beth Butler reviewed initiative goals, the work plan for the next year, and outlined DI-NC's collective impact approach that will focus on providing technical assistance, coordination, and other support for the efforts of the Unified State Plan Committee to increase the percentage of positive employment outcomes for individuals living with I/DD and other disabilities. A review of areas that show strong potential for impacting the lives of individuals living with disabilities included alternatives to career training, coordination of services among participating agencies, expanding career centers, and increased partnership between the Department of Commerce, the Department of Health and Human Services, the Department of Public Instruction and the North Carolina Community College System. DI-NC outlined how current efforts are focused on identification of DI-NC Employment Collaborative Business Advisory Council (BAC) members that will help inform and guide subsequent activities of the initiative. The membership of this council includes business leaders and self-advocates, government agencies, Post-Secondary Education representatives and Workforce Development

representatives. Subsequent activities after the formation of the BAC will involve design of a state employment work plan, alignment of workplan activities across multiple agencies, and identification of common data collection systems and metrics to align efforts across the state.

#### Update on Project Prosperity NCABLE Initiative:

Marquita Robertson reported on the progress of this initiative stating that several planning meetings have taken place to discuss the roles of participating partners. Marquita outlined four core opportunities for promotion of NCABLE including live presentations or trainings, live and on-demand webinars, literature and leave behinds, and overview vignettes. Other highlights included plans to update the Upward to Financial Stability Curriculum that will include a full module on NCABLE. Marquita highlighted a plan to mainstream NCABLE, using outreach activities with transitional services, financial institutions, Exceptional Children's Programs, and conferences and conventions.

#### Financial Updates

Yadira Vasquez provided an update to the committee members. Yadira explained that funds for new initiatives total approximately \$242,500 but that amount may go up or down over the next few months. There were no questions from the members.

#### New Initiative Discussions

Amanda Bergen transitioned the conversation into Future Investments, asking Travis Williams to take the lead on reviewing the SWOT Analysis and Future Investment Ideas handouts included in their committee packets. Discussion on these topics ensued.

After new initiative discussions, Dreama McCoy made a motion to pursue research on the following areas:

1. Benefits counseling expansion.
2. Research and evaluate community college programs for students living with I/DD that emphasize the following areas: job specialized training, life skills, communication and soft skills.
3. Research the potential feasibility for a parent peer workbook that emphasizes resources for students living with I/DD that are transitioning from non-college track courses of study and addresses education of parents regarding increased expectations regarding competitive integrated employment.

Ryan Rotundo seconded the motion. The motion passed with a unanimous vote.

#### Wrap up and Reminders

Amanda Bergen reminded committee members to turn in their travel and that the next Council meeting will be held in Cary NC, August 8<sup>th</sup> and 9<sup>th</sup>, 2019 at the Hilton Garden Inn.

Kelly Woodall-Beauchamp made a motion to adjourn. Myron Gavin seconded the motion. Amanda Bergen adjourned the meeting at 5:05 pm.

# Five-Year State Plan



Listen. Gather. Act.



NCCDD Five-Year State Plan Identifications of  
Council Meeting Activities  
August 8-9, 2019

<b><u>COMMITTEE</u></b>	<b><u>STATE PLAN ID</u></b>	<b><u>DESCRIPTION</u></b>
<b>MEMBER DEVELOPMENT</b>		
	All Goals	RFA Research/Future Investments Discussion
	All Goals	ADA Training by member
	All Goals	Five-Year Plan Update
	All Goals	Member Recognition
<b>POLICY UPDATE</b>		
	All Goals	Public Policy Update
<b>CONTINUATION FUNDING REQUESTS</b>		
ADC	3B	NC ADA Network/Fiscal Intermediary Leadership Development Training
CC	All Goals	NCCDD Communications
<b>ADVOCACY DEVELOPMENT</b>		
	3B	Leadership Development Training Initiative-Disability Rights North Carolina
	3A	ADA Network Coordination, Technical Assistance & Fiscal Intermediary-Community Enterprises LLC
	3A	NC Empowerment Network RFA Research/Future Investments Discussion
<b>COMMUNITY LIVING</b>		
	2B	From Planning to Action: Integrated, Collaborative Care for People with Intellectual and Developmental Disabilities-The Arc of NC
	2C	Rethinking Guardianship: A Person-Centered Approach-The Jordan Institute for Families
	2B	Supported Living: Making the Difference-Vaya Health
	2C	Natural Support Network Development-FIRST RFA Research/Future Investments Discussion

**FINANCIAL ASSET DEVELOPMENT**

- 1B Inroads to Employment-DisAbility:IN NC
- 1B/C Project Prosperity-The Collaborative
- 1B/C North Carolina Employment Collaborative-DisAbility:IN NC
- RFA Research/Future Investments Discussion

**FULL COUNCIL MEETING-NEW BUSINESS**

- All Goals Approval of NCCDD Communications initiative
- Approval of 2020 Council Meeting Dates
- Reminder of next Five-Year State Plan/Ad Hoc Committee Update
- NC DD Network Partners' Updates
  - Disability Rights North Carolina
  - Carolina Institute for Developmental Disabilities
  - NC Empowerment Network



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## 2017 - 2021 Five Year State Plan Goals and Objectives

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The NCCDD will advance the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (DD Act) expectations of self-determination, independence, productivity, integration and inclusion in community life for individuals with intellectual and other developmental disabilities (I/DD) and their families.

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### GOAL 1: Increase Financial Security

#### **GOAL 1: By 2021, INCREASE FINANCIAL SECURITY THROUGH ASSET DEVELOPMENT FOR INDIVIDUALS WITH INTELLECTUAL AND OTHER DEVELOPMENTAL DISABILITIES (I/DD)**

Increase financial asset development for individuals with intellectual and developmental disabilities (I/DD) so that they and their families have greater opportunities for choice, self-determination, independence and productivity.

**OBJECTIVE A:** Increase financial asset development and security by increasing knowledge, developing financial plans and implementing the plan's goals.

*Measurement:* More individuals with I/DD will have a financial plan, leading to greater security.

**OBJECTIVE B:** Increase integrated competitive employment and careers

*Measurement:* More individuals with I/DD will have integrated, competitive employment and careers through collaboration which will include education, workforce development, employment supports, employer engagement and barrier reduction.

**OBJECTIVE C:** Increase educational expectations for employment and careers

*Measurement:* More individuals with I/DD will have educational expectations and education regarding employment and career goals, as will their families and other stakeholders through increased knowledge and meaningful collaborations.

## 2017 - 2021 Five Year State Plan Goals and Objectives



Listen. Gather. Act.



### GOAL 2: Increase Community Living

#### **GOAL 2: By 2021, INCREASE COMMUNITY LIVING FOR INDIVIDUALS WITH INTELLECTUAL AND OTHER DEVELOPMENTAL DISABILITIES (I/DD)**

Throughout their lifespan, more individuals with intellectual and developmental disabilities (I/DD) will be fully included, respected, valued and supported in their communities.

##### **OBJECTIVE A: Increase community housing and transportation**

**Measurement:** More individuals with I/DD will choose where and with whom to live in their community and will have transportation options to support community living and employment.

##### **OBJECTIVE B: Increase health access and wellness opportunities**

**Measurement:** More individuals with I/DD will have access to, and continuity of healthcare and wellness opportunities through individual and family education and provider capacity building.

##### **OBJECTIVE C: Increase healthy community relationships**

**Measurement:** More individuals with I/DD will have healthy relationships and positive community connections that will support personal choice and decision making.

# 2017 - 2021 Five Year State Plan Goals and Objectives



Listen. Gather. Act.



**GOAL 3: Increase  
Advocacy**

## **GOAL 3: By 2021, INCREASE ADVOCACY FOR INDIVIDUALS WITH INTELLECTUAL AND OTHER DEVELOPMENTAL DISABILITIES (I/DD)**

**More individuals with I/DD will lead and sustain self-directed lives through self-advocacy, family advocacy and stakeholder leadership.**

**OBJECTIVE A:** As mandated by the DD Act, increase support to a statewide self-advocacy organization(s) through leadership development and coalition participation by:

- (I) establishing or strengthening a program for the direct funding of a state self-advocacy organization(s) led by individuals with I/DD,
- (II) supporting opportunities for individuals with I/DD who are considered leaders to provide leadership training to individuals with I/DD who may become leaders and,
- (III) participation in cross-disability and culturally diverse leadership coalitions.

**Measurement:** More individuals with I/DD will knowledgeably advocate and take part in decisions that affect their lives, the lives of others and/or systems.

**OBJECTIVE B:** Increase individual, family, public and system knowledge and engagement to provide system advocacy for the financial security and community living opportunities of individuals with I/DD; with additional specific emphasis to increase the knowledge and engagement of members of the NC Hispanic/Latino community

**Measurement:** More individuals with I/DD and their families will knowledgeably advocate and take part in decisions that affect their lives, the lives of others and/or systems; with additional specific emphasis to produce accessible communication so more Hispanic/Latino individuals with I/DD will lead and sustain self-directed lives through self-advocacy, family advocacy and stakeholder leadership.

**OBJECTIVE C:** Increase professional development to improve expectations and supports for individuals with I/DD

**Measurement:** More I/DD professionals, other professionals and community leaders will receive leadership development to support collective impact to advance the financial security and community living opportunities of individuals with I/DD.

# Fiscal Reports



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



**Advocacy Development Committee  
Initiative Update  
As of July 19, 2019**

**COMMUNITY ENTERPRISES LLC - NC ADA NETWORK/COORD./TA/FI**

**NCCDD Staff:** Melissa Swartz **Current Year:** Year 1 of 3

**Contract Period:** 10/01/18 - 09/30/19 **Paid From:** 2019 FFY

**Last Invoice Received:** May 31, 2019

**Purpose:** Perform the tasks required in Year 1 of a three-year grant in partial fulfillment of the objectives of Goal 3 of the Five-Year Plan of empowering more individuals with I/DD to lead and sustain self-directed lives through self-advocacy, family advocacy and stakeholder leadership.

**FEDERAL FUNDS**

<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 75,000.00	\$ 50,000.00	\$ 25,000.00
<b>Supplies</b>	\$ 2,637.00	\$ 631.94	\$ 2,005.06
<b>Sub-Contract</b>	\$ 12,750.00	\$ 1,446.56	\$ 11,303.44
<b>Other</b>	\$ 23,250.00	\$ 13,424.67	\$ 9,825.33
<b>Indirect Cost</b>	\$ 11,363.00	\$ 7,575.00	\$ 3,788.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 125,000.00</b>	<b>\$ 73,078.17</b>	<b>\$ 51,921.83</b>
<b>MATCH</b>	<b>\$ 41,667.00</b>	<b>\$ 24,438.94</b>	<b>\$ 17,228.06</b>
<b>TOTAL</b>	<b>\$ 166,667.00</b>	<b>\$ 97,517.11</b>	<b>\$ 69,149.89</b>
<b>Target % Expenses</b>		75%	
<b>Actual % Spent</b>		59%	
<b>Match % Spent</b>		59%	

**NOTE:**

The June Request for Reimbursement is due July 15, 2019. The first quarter of the initiative was used to plan for local ADA trainings, activities and projects. Therefore, there was no local in-kind match during the first quarter. The majority of the match will come from local grass roots related to training, activities and projects.

**DISABILITY RIGHTS NC - LEADERSHIP DEVELOPMENT TRAINING**

**NCCDD Staff:** Melissa Swartz **Current Year:** Year 1 of 3

**Advocacy Development Committee  
Initiative Update  
As of July 19, 2019**

**Contract Period:** 07/01/18 - 12/31/19

**Paid From:** 2018 FFY

**Last Invoice Received:** June 30, 2019

**Purpose:**

This initiative will identify leadership outcomes for participants, develop and pilot in-depth training, and evaluate the training. This initiative will also provide training for trainers in leadership development.

<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 46,000.00	\$ 18,755.44	\$ 27,244.56
<b>Fringe Benefits</b>	\$ 11,185.00	\$ 1,424.14	\$ 9,760.86
<b>Travel</b>	\$ 990.00	\$ 5.13	\$ 984.87
<b>Rent/Cost of Space</b>	\$ 515.00	\$ 365.19	\$ 149.81
<b>Professional Services</b>	\$ 3,380.00	\$ 24.04	\$ 3,355.96
<b>Sub-Contract</b>	\$ 120,875.00	\$ 18,854.98	\$ 102,020.02
<b>Other</b>	\$ 12,055.00	\$ 1,031.26	\$ 11,023.74
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 195,000.00</b>	<b>\$ 40,460.18</b>	<b>\$ 154,539.82</b>
<b>MATCH</b>	<b>\$ 65,000.00</b>	<b>\$ 12,219.00</b>	<b>\$ 52,781.00</b>
<b>TOTAL</b>	<b>\$ 260,000.00</b>	<b>\$ 52,679.18</b>	<b>\$ 207,320.82</b>
<b>Target % Expenses</b>	56%		
<b>Actual % Spent</b>	21%		
<b>Match % Spent</b>	19%		

**NOTE:**

The July Request for Reimbursement is due August 15, 2019. Contractor staffing transitions delayed initiative activities start.

**Community Living Committee  
Initiative Update  
As of July 19, 2019**

FIRST - NATURAL SUPPORT NETWORK			
<b>NCCDD Staff:</b>	Philip Woodward	<b>Current Year:</b>	Year 2 of 3
<b>Contract Period:</b>	03/01/19 - 02/29/20	<b>Paid From:</b>	2018 FFY
<b>Last Invoice Received:</b>	June 30, 2019		
<b>Purpose:</b>	<p>This initiative is to focus on the importance of non-paid relationships in the lives of individuals with I/DD and foster opportunities for natural supports in the life of a person with I/DD. Specifically, understanding how natural supports develop and sustain themselves; creating strategies leading to community involvement and developing valuable and lasting interpersonal relationships; collaborating to advance the principles of community living, self-advocacy, and families involvement; and developing a frame work/blueprint to foster natural supports opportunities in rural and urban communities in North Carolina.</p>		
<b>FEDERAL FUNDS</b>			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 29,000.00	\$ 9,666.72	\$ 19,333.28
Fringe Benefits	\$ 3,072.00	\$ 739.64	\$ 2,332.36
Supplies	\$ 2,150.00	\$ 554.34	\$ 1,595.66
Travel	\$ 4,000.00	\$ -	\$ 4,000.00
Sub-Contract	\$ 32,778.00	\$ 16,428.00	\$ 16,350.00
Other	\$ 4,000.00	\$ 1,007.26	\$ 2,992.74
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 75,000.00</b>	<b>\$ 28,395.96</b>	<b>\$ 46,604.04</b>
<b>MATCH</b>	<b>\$ 25,000.00</b>	<b>\$ 6,076.86</b>	<b>\$ 18,923.14</b>
<b>TOTAL</b>	<b>\$ 100,000.00</b>	<b>\$ 34,472.82</b>	<b>\$ 65,527.18</b>
Target % Expenses		33%	
Actual % Spent		38%	
Match % Spent		25%	
<b>NOTE:</b>	The July Request for Reimbursement is due August 15, 2019.		

**Community Living Committee  
Initiative Update  
As of July 19, 2019**

**NCCDD Staff:** Philip Woodward  
**Contract Period:** 07/01/18 - 12/31/19  
**Last Invoice Received:** June 30, 2019

**Current Year:** 18 MONTHS  
**Paid From:** 2018 FFY

**Purpose:**

The purpose of this initiative is to extend the reach of the Rethinking Guardianship: Building a Case for Restrictive Alternatives initiative in order to further long-term changes in North Carolina's guardianship system through promoting less restrictive alternatives to guardianship and respecting the rights of individuals in guardianship and those facing guardianship.

<b>FEDERAL/STATE FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 52,928.00	\$ 42,120.23	\$ 10,807.77
<b>Fringe Benefits</b>	\$ 18,294.00	\$ 15,313.57	\$ 2,980.43
<b>Supplies</b>	\$ 473.00	\$ 94.87	\$ 378.13
<b>Travel</b>	\$ 8,500.00	\$ 7,415.36	\$ 1,084.64
<b>Sub-Contract</b>	\$ 12,000.00	\$ 9,646.52	\$ 2,353.48
<b>Other</b>	\$ 12,350.00	\$ 6,332.03	\$ 6,017.97
<b>Indirect Cost</b>	\$ 10,455.00	\$ 8,092.98	\$ 2,362.02
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 115,000.00</b>	<b>\$ 89,015.56</b>	<b>\$ 25,984.44</b>
<b>MATCH</b>			
<b>TOTAL</b>	<b>\$ 115,000.00</b>	<b>\$ 89,015.56</b>	<b>\$ 25,984.44</b>
<b>Target % Expenses</b>		67%	
<b>Actual % Spent</b>		78%	

**NOTE:**

The July Request for Reimbursement is due August 15, 2019. Out of the \$115,000 funds, \$30,000 is NCCDD federal funds, with state matching funds of \$75,000 from MFP and \$10,000 from TCLI. All the state match funds will be NCCDD match.

**THE ARC OF NC - FROM PLANNING TO ACTION**

**NCCDD Staff:** Philip Woodward  
**Contract Period:** 01/01/19 - 12/31/19

**Current Year:** Year 3 of 3  
**Paid From:** 2019 FFY

**Community Living Committee  
Initiative Update  
As of July 19, 2019**

**Last Invoice Received:** May 31, 2019

**Purpose:**

This initiative uses the information and recommendations gathered in the Medical/Health Home initiative to launch demonstration programs that will advance the innovation and care in services for people with I/DD.

<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
Salaries	\$ 5,000.00	\$ 2,083.35	\$ 2,916.65
Supplies	\$ 100.00	\$ -	\$ 100.00
Travel	\$ 400.00	\$ -	\$ 400.00
Sub-Contract	\$ 117,375.00	\$ 23,049.78	\$ 94,325.22
Other	\$ 1,475.00	\$ 27.94	\$ 1,447.06
Media/Communications	\$ 650.00	\$ -	\$ 650.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 125,000.00</b>	<b>\$ 25,161.07</b>	<b>\$ 99,838.93</b>
<b>MATCH</b>	<b>\$ 50,000.00</b>	<b>\$ -</b>	<b>\$ 50,000.00</b>
<b>TOTAL</b>	<b>\$ 175,000.00</b>	<b>\$ 25,161.07</b>	<b>\$ 149,838.93</b>
Target % Expenses	50%		
Actual % Spent	21%		
Match % Spent	0%		

**NOTE:**

The June Request for Reimbursement is due July 15, 2019. The July Request for Reimbursement is due August 15, 2019.

**VAYA HEALTH - SUPPORTING LIVING: MAKING THE DIFFERENCE**

**NCCDD Staff:**

Philip Woodward

**Current Year:**

Year 3 of 3

**Contract Period:**

01/01/19 - 12/31/19

**Paid From:**

2019 FFY

**Last Invoice Received:**

June 30, 2019

**Purpose:**

This initiative is building capacity within North Carolina to design and implement Supported Living services in partnership with people with I/DD.

<b>FEDERAL/STATE FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
Sub-Contract	\$ 98,500.00	\$ 49,249.98	\$ 49,250.02
Media/Communications	\$ 1,500.00	\$ 750.00	\$ 750.00
<b>FEDERAL/STATE FUNDS TOTAL</b>	<b>\$ 100,000.00</b>	<b>\$ 49,999.98</b>	<b>\$ 50,000.02</b>
<b>MATCH</b>	<b>\$ 68,238.00</b>	<b>\$ 34,115.94</b>	<b>\$ 34,122.06</b>
<b>TOTAL</b>	<b>\$ 168,238.00</b>	<b>\$ 84,115.92</b>	<b>\$ 84,122.08</b>
Target % Expenses	50%		
Actual % Spent	50%		
Match % Spent	50%		

**NOTE:**

The July Request for Reimbursement is due August 15, 2019. Out of the \$100,000 funds, \$75,000 is state funds and \$25,000 is federal funds. All the match funds will be NCCDD match.

**Financial Asset Development Committee  
Initiative Update  
As of July 19, 2019**

**DISABILITY IN dba NC BUSINESS LEADERSHIP NETWORK - INROADS TO EMPLOYMENT**

**NCCDD Staff:** Travis Williams **Current Year:** Year 2 of 3  
**Contract Period:** 03/01/19 - 02/29/20 **Paid From:** 2019 FFY  
**Last Invoice Received:** June 30, 2019

**Purpose:** This initiative produces up to three paid and registered apprenticeship programs in high demand, yet achievable fields; develop collaborations between two local public school systems to advance pre-employment transition service (Pre-ETS) in those local communities; and strengthen the relationship between disability services and career services within the community college system and provide business mentoring opportunities for college students with I/DD.

**FEDERAL FUNDS**

<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 83,500.00	\$ 24,484.00	\$ 59,016.00
<b>Fringe Benefits</b>	\$ 6,387.00	\$ 1,873.03	\$ 4,513.97
<b>Supplies</b>	\$ 413.00	\$ -	\$ 413.00
<b>Travel</b>	\$ 6,100.00	\$ 1,490.77	\$ 4,609.23
<b>Sub-Contract</b>	\$ 2,000.00	\$ -	\$ 2,000.00
<b>Other</b>	\$ 1,600.00	\$ -	\$ 1,600.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 100,000.00</b>	<b>\$ 27,847.80</b>	<b>\$ 72,152.20</b>
<b>MATCH</b>	<b>\$ 33,334.00</b>	<b>\$ 7,128.85</b>	<b>\$ 26,205.15</b>
<b>TOTAL</b>	<b>\$ 133,334.00</b>	<b>\$ 34,976.65</b>	<b>\$ 98,357.35</b>
<b>Target % Expenses</b>		33%	
<b>Actual % Spent</b>		28%	
<b>Match % Spent</b>		22%	

**NOTE:**  
The July Request for Reimbursement is due August 15, 2019.

**DISABILITY IN dba NC BUSINESS LEADERSHIP NETWORK - NC EMPLOYMENT COLLABORATIVE**

**NCCDD Staff:** Travis Williams **Current Year:** Year 1 of 3

**Financial Asset Development Committee  
Initiative Update  
As of July 19, 2019**

**Contract Period:** 03/01/19 - 02/29/20

**Paid From:** 2019 FFY

**Last Invoice Received:** June 30, 2019

**Purpose:**

This initiative represents another step forward in promoting system change efforts to increase employment rates for the I/DD community and other individuals living with disabilities, while supporting state leadership in their efforts to accomplish the goals of the Unified State Plan. This initiative is also encouraged North Carolina becoming an Employment First state.

<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
Salaries	\$ 68,000.00	\$ 17,576.00	\$ 50,424.00
Fringe Benefits	\$ 5,203.00	\$ 1,344.56	\$ 3,858.44
Travel	\$ 4,322.00	\$ 1,246.80	\$ 3,075.20
Sub-Contract	\$ 18,600.00	\$ 5,295.00	\$ 13,305.00
Other	\$ 2,000.00	\$ -	\$ 2,000.00
Media/Communications	\$ 1,875.00		\$ 1,875.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 100,000.00</b>	<b>\$ 25,462.36</b>	<b>\$ 74,537.64</b>
<b>MATCH</b>	<b>\$ 33,603.00</b>	<b>\$ 10,044.90</b>	<b>\$ 23,558.10</b>
<b>TOTAL</b>	<b>\$ 133,603.00</b>	<b>\$ 35,507.26</b>	<b>\$ 98,095.74</b>
Target % Expenses		33%	
Actual % Spent		26%	
Match % Spent		30%	

**NOTE:**

The July Request for Reimbursement is due August 15, 2019.

<b>IDA AND ASSET BUILDING COLLABORATIVE OF NC - NCABLE PROJECT PROSPERITY</b>			
<b>NCCDD Staff:</b>	Travis Williams	<b>Current Year:</b>	Year 1 of 1
<b>Contract Period:</b>	03/01/19 - 02/29/20	<b>Paid From:</b>	2018 FFY
<b>Last Invoice Received:</b>	June 30, 2019		

**Financial Asset Development Committee  
Initiative Update  
As of July 19, 2019**

**Purpose:**

This initiative will include a curriculum modeled on the train the trainer approach with the goal of developing trainers throughout North Carolina. A pilot training will be developed for NC Vocational Rehabilitation staff during this year and used to inform the development of an additional module on NCABLE for the Upward to Financial Stability Curriculum.

<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 12,271.00	\$ 4,090.00	\$ 8,181.00
<b>Fringe Benefits</b>	\$ 2,289.00	\$ 763.00	\$ 1,526.00
<b>Supplies</b>	\$ 3,550.00	\$ -	\$ 3,550.00
<b>Travel</b>	\$ 290.00	\$ -	\$ 290.00
<b>Rent</b>	\$ 200.00	\$ -	\$ 200.00
<b>Indirect Cost</b>	\$ 1,400.00	\$ 467.00	\$ 933.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 20,000.00</b>	<b>\$ 5,320.00</b>	<b>\$ 14,680.00</b>
<b>MATCH</b>			
<b>TOTAL</b>	<b>\$ 20,000.00</b>	<b>\$ 5,320.00</b>	<b>\$ 14,680.00</b>
<b>Target % Expenses</b>		33%	
<b>Actual % Spent</b>		27%	

**NOTE:**

The July Request for Reimbursement is due August 15, 2019.

**Cross Cutting  
Initiative Update  
As of July 19, 2019**

O'NEILL PUBLIC RELATIONS - NCCDD COMMUNICATIONS			
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	Year 1 of 5
<b>Contract Period:</b>	10/01/18 - 09/30/19	<b>Paid From:</b>	2019 FFY
<b>Last Invoice Received:</b>	June 30, 2019		
<b>Purpose:</b>	This initiative conduct communication research, conceptualize, design, implement, and evaluate social marketing, communication/media campaigns, specific to organization work and collaboration with individuals with intellectual and other developmental disabilities (I/DD).		
<b>FEDERAL FUNDS</b>			
BUDGET CATEGORIES	BUDGET	EXPENSES	BALANCE
Salaries	\$ 100,000.00	\$ 74,970.00	\$ 25,030.00
Travel	\$ 6,500.00	\$ 2,879.90	\$ 3,620.10
Sub-Contract	\$ 11,700.00	\$ 5,270.00	\$ 6,430.00
Other	\$ 3,000.00	\$ 1,074.65	\$ 1,925.35
Media/Communications	\$ 9,500.00	\$ 9,100.00	\$ 400.00
Dues/Subscriptions	\$ 4,300.00	\$ 3,240.00	\$ 1,060.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 135,000.00</b>	<b>\$ 96,534.55</b>	<b>\$ 38,465.45</b>
<b>MATCH</b>	<b>\$ 45,000.00</b>	<b>\$ 32,872.50</b>	<b>\$ 12,127.50</b>
<b>TOTAL</b>	<b>\$ 180,000.00</b>	<b>\$ 129,407.05</b>	<b>\$ 50,592.95</b>
Target % Expenses	75%		
Actual % Spent	72%		
Match % Spent	73%		
<b>NOTE:</b>			
The July Request for Reimbursement is due August 15, 2019.			

i2i CENTER FOR INTEGRATIVE HEALTH - CROSS SYSTEM NAVIGATION IN MANAGE CARE			
<b>NCCDD Staff:</b>	David Ingram	<b>Current Year:</b>	Year 2 of 2

**Cross Cutting  
Initiative Update  
As of July 19, 2019**

**Contract Period:** 07/01/19 - 06/30/20

**Paid From:** 2018 FFY

**Last Invoice Received:** 1st RFR due August 15, 2019

**Purpose:**

This initiative is to develop recommendations for the North Carolina Department of Health and Human Services (DHHS) about how individuals with I/DD and their families can best be supported to effectively navigate across various service systems (cross-system navigation) as DHHS moves toward implementation of Medicaid Transformation.

<b>FEDERAL FUNDS</b>			
<b>BUDGET CATEGORIES</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Salaries</b>	\$ 24,997.00	\$ -	\$ 24,997.00
<b>Fringe Benefits</b>	\$ 5,000.00	\$ -	\$ 5,000.00
<b>Supplies</b>	\$ 1,253.00	\$ -	\$ 1,253.00
<b>Travel</b>	\$ 1,750.00	\$ -	\$ 1,750.00
<b>Equipment</b>	\$ 1,500.00	\$ -	\$ 1,500.00
<b>Sub-Contract</b>	\$ 53,750.00	\$ -	\$ 53,750.00
<b>Other</b>	\$ 18,000.00	\$ -	\$ 18,000.00
<b>Indirect Cost</b>	\$ 18,750.00	\$ -	\$ 18,750.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 125,000.00</b>	<b>\$ -</b>	<b>\$ 125,000.00</b>
<b>MATCH</b>	<b>\$ 41,667.00</b>	<b>\$ -</b>	<b>\$ 41,667.00</b>
<b>TOTAL</b>	<b>\$ 166,667.00</b>	<b>\$ -</b>	<b>\$ 166,667.00</b>
<b>Target % Expenses</b>	0%		
<b>Actual % Spent</b>	0%		
<b>Match % Spent</b>	0%		

**NOTE:**

The July Request for Reimbursement is due August 15, 2019.

**In-House  
Initiative Update  
As of July 19, 2019**

IN-HOUSE CONFERENCE FUNDING			
<b>NCCDD Staff:</b>	JoAnn Toomey	<b>Current Year:</b>	8/on-going
<b>Contract Period:</b>	07/01/19 - 06/30/20	<b>Paid From:</b>	2018 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>BALANCE</b>
<b>Conference Funding</b>	\$ 20,000.00	\$ -	\$ 20,000.00
<b>FEDERAL FUNDS 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>NOTE:</b>	The amount of \$4,162.50 has been approved for upcoming conferences.		

IN-HOUSE COUNCIL DEVELOPMENT FUND			
<b>NCCDD Staff:</b>	JoAnn Toomey	<b>Current Year:</b>	16/on-going
<b>Contract Period:</b>	07/01/19 - 06/30/20	<b>Paid From:</b>	2018 FFY
<b>Purpose:</b>	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.		
<b>FEDERAL FUNDS</b>			
<b>IN-HOUSE</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Council Development</b>	\$ 40,000.00	\$ -	\$ 40,000.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 40,000.00</b>	<b>\$ -</b>	<b>\$ 40,000.00</b>
<b>Target % Expenses</b>	0%		
<b>Actual % Spent</b>	0%		
<b>NOTE:</b>	None		

IN-HOUSE JEAN WOLFF-ROSSI FUND			
<b>NCCDD Staff:</b>	JoAnn Toomey	<b>Current Year:</b>	23/on-going

**In-House  
Initiative Update  
As of July 19, 2019**

**Contract Period:** 07/01/19 - 06/30/20

**Paid From:** 2018 FFY

**Purpose:**

This initiative provides funding to NC citizens with I/DD and their families to participate in diverse learning forums and conference, 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>	\$ 30,000.00	\$ -	\$ 30,000.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 30,000.00</b>	<b>\$ -</b>	<b>\$ 30,000.00</b>
<b>Target % Expenses</b>	0%		
<b>Actual % Spent</b>	0%		

**NOTE:**

The amount of \$15,452 has been approved for participants and the amount of \$742 is waiting to be paid by the Controller's office. The amount of \$13,806 is available.

**IN-HOUSE PUBLIC POLICY**

**NCCDD Staff:** JoAnn Toomey

**Current Year:** 10/on-going

**Contract Period:** 07/01/19 - 06/30/20

**Paid From:** 2018 FFY

**Purpose:**

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.

<b>FEDERAL FUNDS</b>			
<b>IN-HOUSE</b>	<b>BUDGET</b>	<b>EXPENSES</b>	<b>BALANCE</b>
<b>Public Policy</b>	\$ 60,000.00	\$ -	\$ 60,000.00
<b>FEDERAL FUNDS TOTAL</b>	<b>\$ 60,000.00</b>	<b>\$ -</b>	<b>\$ 60,000.00</b>
<b>Target % Expenses</b>	0%		
<b>Actual % Spent</b>	0%		

**NOTE:**

None

## 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.



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



## **2020 Possible Council Meeting Dates**

February 6 & 7, 2020

May 7 & 8, 2020 **(Winston Salem)**

August 6 & 7, 2020

November 4-6, 2020

# For Your Information



**NCCDD**  
North Carolina Council on  
Developmental Disabilities



## News

## Transportation Pilot Provides Free Rides Across County Lines

March 1, 2019 | Christine Rudd



Advantage Ride, a free door-to-door transportation service that allows riders with disabilities to cross county lines is being piloted in Hillsborough, Manatee, and Pinellas counties through June.

Safe, affordable, and accessible transportation options that fit the specific needs of people with disabilities are few and far between. In partnership with the [Florida Commission for the Transportation Disadvantaged](#), UZURV – parent to Advantage Ride – is attempting to fill this need in the disability community. They are an adaptive transportation network company focused on providing safe and reliable transportation to persons with disabilities. UZURV is currently the vendor

providing paratransit service for the [Greater Richmond Transit Company](#) in Richmond, Virginia, and operates similar services in Arizona, Tennessee, and North Carolina.

If you've ever been a paratransit passenger, you probably know that one of the main concerns of using any of these services is getting to your destination in a timely fashion. According to UZURV's Vice President of Corporate Outreach, Trish Fitzpatrick, their on-time performance rate is between 95-97%.

Right now, Advantage Ride is limited to individuals on the Medicaid waiver and waiver waiting list. Eligible riders in Hillsborough, Pinellas, and Manatee Counties can travel for any purpose within and between these counties that are not provided through their waiver services. Wheelchair accessible vehicles are available and caregivers are permitted to ride along free of charge.

Rides are free under the Advantage Ride pilot and can be scheduled two weeks to two hours in advance by phone. UZURV rides in other cities charge a nominal fee. Riders receive text message notifications and all rides are GPS tracked and monitored. If a passenger needs to cancel their ride, Advantage Ride requests a two-hour window. They're trying to expand the ways passengers can book rides. One method they are exploring is an online app where passengers can schedule trips using their computer or device. Those who aren't internet savvy need not worry since the call-in option will still be available.

Funding for this pilot is provided by the state of Florida and administered by the Commission for the Transportation Disadvantaged. It officially began in January of 2019 and is slated to last six months. The program is the result of recommendations from the Florida Legislature's Transportation Task Force that was formed in 2017 to address transportation priorities advocated for by various disability agencies including the [Florida Developmental Disabilities Council](#) and [Florida Self-Advocates Network](#)<sup>D</sup> (FL SAND). Advantage Ride's service delivery model is similar to ride-sharing services such as Uber and LYFT, but riders can request a favorite driver they've had before. The drivers aren't your typical run-of-the-mill paratransit drivers either. They set their own schedules, are independent contractors, are background checked, and are required to complete CPR and disability sensitivity training. UZURV also recruits drivers who already work in a helping profession. Advantage Ride training is being delivered live through advocacy groups and via webinar.

Self-advocates can hopefully make strides with this service by not only trying it out if they live in the pilot counties but by helping to spread the word with agencies and people with disabilities. Once the pilot is complete we can also help advocate for its expansion, either as is or with improvements. Advantage Ride is definitely a move in the right direction. Let your voice be heard and let's do our best to help expand the service so that others who aren't on the waiver can have this available to them as a transportation option in our communities.

Tags: News





Florida Self-Advocacy Central is the news and information arm of Florida Self-Advocates Network'D or FL SAND.

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# The Impact of the Low-Income Housing Tax Credit in North Carolina

Low-Income Housing Tax Credits fund affordable rental housing for low-income North Carolinians, including working families, seniors, formerly homeless veterans and persons with disabilities. The Housing Credit has far-reaching impacts. With the help of state-funded programs that support it, the credit saves taxpayer dollars and acts as an economic driver, particularly in rural regions of the state.

## BACKGROUND

The Low-Income Housing Tax Credit, a public-private partnership, is the most crucial affordable housing tool in the country. The credit incentivizes private developers and investors to build apartments that low-income residents can afford. In North

Carolina, the credit has financed **83,000** apartments that charge rents affordable to low-income tenants, which would not otherwise generate enough cash flow to be financially feasible.<sup>1</sup>

The credit also promotes success for North Carolina children. Beyond economic benefits, the Housing Credit promotes residents' well-being. When affordable options are unavailable, families may be forced to rent unsafe, overcrowded or otherwise substandard apartments, which can cause illness and developmental delays in children.<sup>2,3</sup> Affordable housing can also prevent frequent moves, which improves children's educational outcomes by supporting school attendance.<sup>4</sup>

In short, every tax dollar invested in the Housing Credit generates value for all North Carolinians.

*The Housing Credit's All-Time*  
**ECONOMIC IMPACT**  
*in North Carolina*

**\$7.5 BILLION**  
in property value

**\$923 MILLION**  
in tax revenue

**2:1 LEVERAGE**  
of additional public and private funds

**137,000**  
jobs

## IMPACT SNAPSHOT: HEALTH CARE SAVINGS

Affordable housing combined with supportive services for tenants can generate significant public health care savings. In North Carolina, Housing Credit properties are required to participate in the Targeting Program by setting aside 10-20% of units for people with disabilities. Local service agencies provide access to supports and services, such as health care or case management, to tenants of Targeted Units. Research has found that living in affordable housing coupled with support services lowers the medical expenses of tenants who are elderly or have disabilities by an average of **\$1,000** per year.<sup>5</sup> For tenants with intensive services needs, health care cost savings are even higher, around **\$6,000** per year.<sup>6</sup>

In North Carolina, the Housing Credit saves up to **\$3** in health care dollars for every **\$1** invested over the life of the program.<sup>7</sup> Because Targeted Unit tenants have very low incomes and receive public

disability benefits, their health care costs are typically paid by taxpayer dollars. Based on research on comparable programs, the 3,500 households who currently occupy Targeted Units could save taxpayers between **\$3.5 and \$21 million** in public health care dollars each year.<sup>8</sup>

**Saves as much as \$3 in taxpayer health care dollars**

**Every \$1 in Housing Credit equity**

NORTH CAROLINA

HOUSING  
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## IMPACT SNAPSHOT: STATE FUNDING BOOSTS THE HOUSING CREDIT IN RURAL TOWNS

The Housing Credit drives housing development in rural communities across the state. In some counties, Housing Credit developments have been the only new residential construction in years, driving the building industry in those areas, fueling local property tax revenues and providing much-needed affordable rental housing.

The Housing Credit does not operate on its own—state funding like the Workforce Housing Loan Program (WHLP) maximizes its impact. WHLP makes Housing Credit developments viable in rural communities, where rents are not high enough to cover building costs and repay development loans, leaving a funding gap that renders Housing Credit development infeasible. WHLP fills that gap and helps developers repay their debts. In the few short years since WHLP's creation in 2015, the program has helped finance **45 properties** and created more than **2,700 units of affordable rental housing** in rural communities across the state.

All Housing Credit properties in rural areas\*



### RURAL IMPACT

**35,600** apartments  
**56,000** jobs  
**\$380 million** in tax revenue  
**\$3.1 billion** in property value

\* This map shows all Housing Credit properties in rural areas of the state. Rural areas are those that are eligible for USDA single-family loans.

While the Housing Credit finances about 4,100 affordable rental units each year in North Carolina, more development is necessary to meet a growing need.<sup>9</sup> More than 526,000 low-income households in the state pay more than they can afford in rent; the average renter in North Carolina earns \$14.14 per hour but the average wage needed to afford a two-bedroom apartment is \$15.79 per hour.<sup>10,11</sup> Increasing state supports like the Workforce Housing Loan Program would enhance the Housing Credit's ability to provide housing for families and individuals as well as economic benefits for surrounding communities and taxpayers at large.

- To learn more about the Housing Credit and the North Carolina Housing Finance Agency's other rental development programs, visit [www.nchfa.com/rental-housing-partners/rental-developers](http://www.nchfa.com/rental-housing-partners/rental-developers).
- To learn more about our policy and research work, visit [www.nchfa.com/about-us/research-reporting-and-policy](http://www.nchfa.com/about-us/research-reporting-and-policy).

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7. This calculation assumes \$6,000 per year (over 30 years) in healthcare savings per Targeted Unit and \$61,000 per unit in financing (one-time cost), which is the average amount of financing provided per unit for all properties that currently have Targeted Units.
8. The calculation for this range was: Number of Targeted Unit households (3,500) x healthcare savings per household (\$1,000-6,000)
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# Turning Rights Into Reality: How Guardianship and Alternatives Impact the Autonomy of People with Intellectual and Developmental Disabilities



June 10, 2019

[Full Report \(PDF\)](#)

[Full Report \(DOC\)](#)

[Press Release \(HTML\)](#)

**SCOPE:** NCD undertook this report to increase the understanding of guardianship and its impact on the lives of people with intellectual and developmental disabilities (ID/DD) and their families. In this report, NCD examines why people with ID/DD are at increased risk for becoming subject to guardianship as adults, and how that impacts their ability to benefit from civil rights laws aimed at advancing the self-determination and opportunities available to people with ID/DD, including the Americans with Disabilities Act, the Developmental Disabilities Act, the Individuals with Disabilities Education Act, and the Workforce Innovation and Opportunity Act. The report examines how people with ID/DD are treated differently than other adults who are the subjects of guardianship proceedings, including in several states that have separate guardianship laws for people with ID/DD. The findings and recommendations are based on the available data on guardianship for people with ID/DD, an in-depth examination of the experiences of individuals with ID/DD in Washington, DC, and information collected directly from stakeholders across the nation.

**SUMMARY:** Guardianship is the process through which an adult can be found legally incapable of making decisions for him or herself and another adult is appointed to make decisions on behalf of that individual. Individuals with ID/DD are at greater risk of being subject to guardianship than other adults because of widely-held stereotypes about their ability to make decisions and function as adults. The report's major findings include:

- People with ID/DD currently are at higher risk for guardianship because of the school-to-guardianship pipeline.
- A minority of states have guardianship provisions that are applicable solely to people with ID/DD, as opposed to other alleged disabilities. While some statutes incorporate additional procedural safeguards, these statutes do not always advance the procedural due process rights of people with disabilities.
- Despite the existence of restoration of rights procedures in many state laws, many people with ID/DD and their families are unaware of those options, nor of the broad array of less-restrictive options.
- There is a dearth of reliable data on the number of adult abuse, neglect or exploitation cases in which the perpetrator is the court-appointed guardian of the victim.

The report concludes with recommendations for policymakers.

## NCD Policy Areas

CRPD

Civil Rights

Cultural Diversity

Education

Emergency Management

## ACRONYMS IDENTIFICATION GUIDE

AA -	Alcoholics Anonymous
AAA -	Area Agency on Aging
AAS -	Division of Aging and Adult Services
ABA -	Applied Behavior Analysis
AC -	Advisory Council
ACA -	Affordable Care Act
ACC -	Alternative Augmentative Communication
ACF -	Administration for Children and Families
ACH -	Adult Care Home
ACL -	Administration on Community Living
ACT Team -	Assertive Community Treatment Team
ADA -	Americans with Disabilities Act
ADD -	Attention Deficit Disorder
ADHD -	Attention Deficit Hyperactivity Disorder
ADL -	Activities of Daily Living
ADR -	Alternative Dispute Resolution
AG -	Attorney General
AIDD -	Administration on Intellectual and other Developmental Disabilities
ALF -	Assisted Living Facility
ALJ -	Administrative Law Judge
A&N -	Abuse and Neglect
AOC -	Administrative Office of the Courts
AOD -	Attorney of the Day
APS -	Adult Protective Services
ASD -	Autism Spectrum Disorders
ASL -	American Sign Language
AT -	Assistive Technology
BD -	Behavior Disorder
BIP -	Behavior Intervention Plan
BOD -	Board of Directors
CAP/C -	Community Alternatives Program for Children
CAP/DA -	Community Alternatives Program for Disabled Adults
CAP/I-DD -	Community Alternatives Program for Persons with Intellectual and Developmental Disabilities (Innovations Waiver)
CAP -	Client Assistance Program
CC4C -	Care Coordination for Children
CCME -	Carolinas Center for Medical Excellence
CCNC -	Community Care of North Carolina
CFAC -	Consumer and Family Advisory Committee
CFR -	Code of Federal Regulations
CHIP -	Children's Health Insurance Program
CIL -	Center for Independent Living
CLA -	Carolina Legal Assistance
CM -	Case Manager/Case Management

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CMHS -	Center for Mental Health Services
CMI -	Chronic Mental Illness
CMS -	Centers for Medicare & Medicaid Services
COB -	Close of Business
COPD -	Chronic Obstructive Pulmonary Disease
CP -	Cerebral Palsy
CPS -	Child Protective Services
CRP -	Community Rehabilitation Program
CSU -	Crisis Stabilization Unit
CWIC -	Community Work Incentive Coordinator
DD -	Developmental Disabilities (also known as IDD -Intellectual & other DD)
DD Act -	Developmental Disabilities Assistance and Bill of Rights Act
DDS -	Disability Determination Services
DHHS -	Department of Health and Human Services
DHSR -	Division of Health Service Regulation
DMA -	Division of Medical Assistance
DME -	Durable Medical Equipment
DMHDDSAS -	Division of Mental Health Developmental Disabilities Substance Abuse Services
DOJ -	Department of Justice
DOL -	Department of Labor
DPI -	Department of Public Instruction
<b>DRNC -</b>	<b>Disability Rights North Carolina (but prefer to be called Disability Rights)</b>
DSA -	Designated State Agency
DSB -	Division of Services for the Blind
DSOHF -	Department of State Operated Healthcare Facilities
DSS -	Department of Social Services (local county)
EC -	Exceptional Children
ED -	Emotional Disturbance/Disability
EEOC -	Equal Employment Opportunity Commission
EPSDT -	Early Periodic Screening, Diagnosis and Treatment
ERISA	Employee Retirement Income Security Act
ESL -	English as a Second Language
ESY or EYS -	Extended School Year or Extended Year Services
FAPE -	Free Appropriate Public Education
FBA -	Functional Behavioral Assessment
FCH -	Family Care Home
FCSR -	Facility Client Service Request
FERPA -	Family Education Rights and Privacy Act
FMLA -	Federal Medical Leave Act
FOIA -	Freedom of Information Act
FOP -	Flash Operator Panel
FY -	Fiscal Year
GACPD -	Governor's Advocacy Council for Persons with Disabilities (Decommissioned 7/07)
HAVA -	Help America Vote Act
HCBS -	Home and Community Based Services

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HCBW -	Home and Community-based Waiver
HCWD -	Health Coverage for Workers with Disabilities Act
HIPAA -	Health Insurance Portability and Accountability Act
ICF -	Intermediate Care Facility
ID -	Intellectual Disability
IDEA -	Individual with Disabilities Education Act
IDT -	Interdisciplinary Team
IEP -	Individual Education Program
IFSP -	Individualized Family Service Plan
IHP -	Individual Habilitation Plan
ISP -	Individualized Service Plan
IVC -	Involuntary Commitment
I&M -	Investigations and Monitoring
I&R -	Information and Referral
JCAHO -	Joint Commission on Accreditation of Healthcare Organizations
LANC -	Legal Aid of North Carolina
LEA -	Local Education Agency
LD -	Learning Disability
LHC -	Liberty Healthcare Corporation of North Carolina
LM -	Left Message
LME -	Local Management Entity
LRE -	Least Restrictive Environment
LSSP -	Legal Services of Southern Piedmont
MA -	Mental Age
MCO -	Managed Care Organization
MD -	Muscular Dystrophy
MDD -	Major Depressive Disorder
MDR -	Manifestation Determination Review
MFP -	Money Follow the Person program
MH -	Mental Health
MI -	Mental Illness
MID -	Medicaid Identification Number
MPD -	Multiple Personality Disorder
MR -	Mental Retardation
MS -	Multiple Sclerosis
NAMI -	National Alliance for the Mentally Ill
NCCDD -	North Carolina Council on Developmental Disabilities
NCHC -	North Carolina Health Choice for Children
NDRN -	National Disabilities Rights Network
NHeLP -	National Health Law Program
NIH -	National Institutes of Health
NIMH -	National Institutes of Mental Health
NPRM -	Notice of Proposed Rule Making
NVRA -	National Voter Registration Act
OAH -	Office of Administrative Hearings
OCD -	Obsessive-Compulsive Disorder

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OCR -	Office of Civil Rights
ODD -	Oppositional Defiant Disorder
OMB -	Office of Management and Budget
OSERS -	Office of Special Education and Rehabilitation Services
OT -	Occupational Therapy
<b>P&amp;A -</b>	<b>Protection and Advocacy</b>
<b>PAAT -</b>	<b>Protection and Advocacy for Obtaining Assistive Technology</b>
<b>PABSS -</b>	<b>Protection and Advocacy for Beneficiaries of Social Security</b>
PACE -	Program of All-inclusive Care for the Elderly
<b>PADD -</b>	<b>Protection and Advocacy for Persons with Developmental Disabilities</b>
<b>PAIMI -</b>	<b>Protection and Advocacy for Individuals with Mental Illness</b>
<b>PAIR -</b>	<b>Protection and Advocacy for Individual Rights</b>
PAS -	Personal Assistance Services
PASS -	Plan for Achieving Self Support
PASSR -	Preadmission Screening and Resident Review program
<b>PATBI -</b>	<b>Protection and Advocacy for Persons with Traumatic Brain Injury</b>
<b>PAVA -</b>	<b>Protection and Advocacy Voting Accessibility</b>
PCA -	Personal Care Attendant
PCP -	Person Centered Plan / Primary Care Physician
PCS -	Personal Care Services
PD -	Physical Disability
PII-	Personally Identifiable Information
PNA -	Personal Needs Allowance
POA -	Power of Attorney
PPR -	Program Performance Report
PR -	Public Relations
PRTF -	Psychiatric Residential Treatment Facility (for kids)
PT -	Physical Therapy
PTSD -	Post-Traumatic Stress Disorder
PWD -	Person with Disability
QMHP -	Qualified Mental Health Professional
QP -	Qualified Professional
RC -	Return Call
RCF -	Residential Care Facility
Rehab Act -	Rehabilitation Act
Rep Payee -	Representative Payee – a fee for services responsibility determined by the Social Security Administration
RFP -	Request for Proposal
RIF -	Reduction in Force
RSA -	Rehabilitation Services Administration
RSDI -	Retirement, Survivors, Disability Insurance
RTC -	Residential Treatment Center
RTF -	Residential Treatment Facility
SA -	Substance Abuse
SAA -	Self Advocacy Assistance (formerly STA – Self Advocacy Technical Assistance or Short-term Assistance)

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SAMHSA -	Substance Abuse and Mental Health Services Administration
SAS -	Supplementary Aids and Services
SCL -	Supported Community Living
SED -	Serious Emotional Disturbance
SFC -	Specialized Family Care
SGP -	Statement of Goals & Priorities
SHO -	State Hearing Officer
SLD -	Specific Learning Disability
SPOA -	Specific Power of Attorney
S&R -	Seclusion and Restraint
SR -	Service Request
SRO -	School Resource Officer
SSA -	Social Security Administration
SSDI -	Social Security Disability Insurance
SSI -	Supplemental Security Income
TANF -	Temporary Assistance for Needy Families
TAR -	Technical Assistance Request
TASC -	Training and Advocacy Support Center
TBI -	Traumatic Brain Injury
TDD -	Telecommunication Device for the Deaf
Title I -	Part of ADA covering employment discrimination
Title II -	Part of ADA covering state and local government programs
Title III -	Part of ADA covering places of public accommodation
Title XIX -	Medicaid
TTY -	Tele-Typewriter
UCEDD -	University Centers for Excellence in Development Disabilities
UCP -	United Cerebral Palsy
UM -	Utilization Management
USC -	United States Code
VA -	Veterans Administration
VI -	Visual Impairment
Voc Ed -	Vocational Education
VR -	Vocational Rehabilitation
VRS -	Vocational Rehabilitation Services
WIOA -	Work Incentives Opportunity Act replaces the Rehabilitation Act

NC DHHS Acronyms Glossary:

[http://cstdata.com/admin/modules/document\\_repository/docs/2bdfa402a6f6370ec3fed5b4a970588f.pdf](http://cstdata.com/admin/modules/document_repository/docs/2bdfa402a6f6370ec3fed5b4a970588f.pdf)

NC DHHS Abbreviations/Acronyms/Form Titles

<http://info.dhhs.state.nc.us/olm/manuals/dsb/mec/man/Abbrev-acronyms-titles.htm>

CMS Acronym List:

<https://www.cms.gov/apps/acronyms/listall.asp?Letter=ALL>

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