A kit from the Self-Determination Institute and the Self-Determination Tech Alliance

You are not alone

Start your own team: two or more people going through it together. Learn the three ways to get your regional center services side by side, then take the next steps together, one meeting at a time.

Your team runs its own meetings. This kit gives you the steps, the homework and a one-page roster to print.

Why a team

People learn this from each other. On a team, you share what you find out, remind each other of the next step and keep each other going.

A team can be two people: self-advocates, family members, friends, or a mix. Each person can bring someone who supports them.

Meet where it works for you: at a kitchen table, at a library, on a phone call or on video, in the language your team shares. This kit is in English and Spanish.

Start with the three ways

There are three ways to get your regional center services. You choose. A team can start before anyone has chosen.

Your regional center arranges it.
Less for you to manage.

Traditional services

Your regional center arranges your services with providers it works with.

Who finds your providers: Your regional center, and you can ask for a provider you prefer.

Good to know: Less for you to manage. Most people get services this way.

Participant-directed services

Inside traditional services, you can direct certain services yourself, such as respite or personal assistance. You hire your own worker, for the hours approved for you, at a set rate. A financial management service pays them after you approve their hours.

Who finds your providers: You, for those services.

Good to know: You are the employer, or share that role with the financial management service. There is no individual budget.

Self-Determination Program (SDP)

You get an individual budget, based on the services already approved for you. You decide how it is spent and who provides your services.

Who finds your providers: You, with help from an independent facilitator (paid from your budget) or your service coordinator.

Good to know: More of the work is yours, like a spending plan tied to your goals. A financial management service pays your providers. SDP starts with a free orientation.

You direct it.
More choice and control,
and more of the work.

In all three, you stay with your regional center and still have a service coordinator.

New to regional centers? Read the basics (choices.sdta-np.com/basics): what a regional center is, who can get services, and how to apply.

The meetings in this kit follow the steps of the Self-Determination Program, where more of the work is yours. A team is one way to share it. Whichever way each person chooses, they stay on the team: the first meeting, and the plans you write for meeting 3, work for all three ways.

Find your people

Two people are enough to start. Here are four places to look.

People you already know.

Someone you met at school, at therapy, at a support group, at your place of worship or in your neighborhood. Ask them: “Do you want to learn this together?”

Self-advocacy groups and parent groups.

Many already meet every month. Ask for a few minutes at a meeting to invite people to your team.

Your local Self-Determination advisory committee.

Every regional center has a local Self-Determination advisory committee. Its meetings are open to the public. People there are learning about SDP, and some are already in it. Find a meeting: completeguidetosdp.org/statewide-sdp-events

The Choice Crew.

People across California have joined the Choice Crew to spread the word about the three ways. The crew page lists people who joined recently, with their city and regional center area. It is not a contact list, so use it to see who is near you, then look for them at a local meeting. If you join too, your email is never published, but everything else you write on the form is shown on the page. So never put a phone number or an email address in the other boxes. choices.sdta-np.com/crew

Run your first meeting

Before you meet

- Pick a day, a time and a place that work for everyone, or a phone or video call. Plan on about an hour.

- Ask each person what helps them take part, such as a ride, interpretation, large print, captions or breaks.
- Print the team roster and plan at the end of this kit.
- Choose one person to lead this meeting and one to take notes. Take turns after that.

The first meeting, about an hour

1 Say hello 10 minutes

Each person says their name and one thing they want: for their own life, or for the person they support.

2 Learn the three ways 20 minutes

Read the three ways out loud, on this page or on the Choices flyer (choices.sdta-np.com/crew). Each person says which ones they want to know more about. Nobody has to choose today.

3 Say where you are 10 minutes

Some people are just hearing about this. Some are getting ready for a planning meeting. Some already get services one way and are thinking about another. Every step someone has taken is something the team can learn from.

4 Agree on how you work together 10 minutes

Read the team agreements below. Add your own.

5 Plan what comes next 10 minutes

Fill in the roster, set the date of the next meeting, and look over the homework for meeting 1.

Team agreements

- Each person makes their own choices. The team helps; it does not decide for anyone.
- What someone shares about their life or their family stays in the team.
- Share what happened for you, not what someone else should do.
- Everyone gets a turn to talk, and nobody has to.
- When a question needs a firm answer about your own services, ask your service coordinator, in writing. DAN can help you get ready to ask.

Meeting by meeting

Meet about once a month. Each meeting has something to do together and homework for the weeks in between. Go at your own pace: people can be at different steps, and that is part of how a team helps.

1 Get started

At the meeting

- Hold your first meeting, as above. Learn the three ways.

Homework before the next one

- Register for the free Self-Determination Program orientation from the State Council on Developmental Disabilities, also in Spanish: scdd.ca.gov/sdp-orientation. It has two parts, two hours each, and Part A comes first. Try to pick the same sessions so you can go together.
- Each person registers and stays for the whole of each live session. The recordings are for review only: they do not give you the certificate that SDP needs.
- Before joining SDP, one of these people must finish both parts. If the services are for an adult: the person, or their conservator or authorized representative. If they are for a child: a parent or legal guardian. If you took the orientation before April 1, 2026, you do not need to take it again.
- Write down your questions about the three ways. Ask DAN, day or night.

2 Orientation together

At the meeting

- Go to the orientation together, or each go and meet soon after. Talk it over: what was new, what surprised you, and what you still want to ask.
- The orientation covers the three ways, person-centered planning, the individual budget, the spending plan, independent facilitators and financial management services.

Homework before the next one

- Start your person-centered plan in Acierto PCP: acierto-pcp.sdta-np.com. No sign-up. What you type stays on your device. Use your own phone or computer.
- If you choose the Self-Determination Program, tell your service coordinator that you want to join. Ask in writing so there is a record. DAN can help you write it.

3 Plans side by side

At the meeting

- Bring your person-centered plans. Take turns sharing one part you are proud of and one part you are stuck on. Help each other put what you want into words.
- A person-centered plan helps in all three ways. Bring it to your planning meeting.

Homework before the next one

- Look at Acierto IF (independent facilitators), acierto-if.sdta-np.com, and Acierto FMS (financial management services), acierto-fms.sdta-np.com. Pick a few of each to learn more about.
- Everything you need to know about SDP, step by step, from the Self-Determination Institute: completeguidetosdp.org

4 Find a facilitator and an FMS

At the meeting

- Compare what you found. In SDP, a financial management service (FMS) pays your providers. Everyone in SDP has one.
- An independent facilitator is your choice. You can work with one, paid from your budget, or with your service coordinator.
- Before you join SDP, the regional center can approve and pay for a facilitator's help. After you join, your FMS pays your facilitator from your budget. You never pay a facilitator yourself. If a facilitator asks you for money, do not pay. Talk to your service coordinator.

Homework before the next one

- Talk with at least two FMSs and, if you want a facilitator, at least two facilitators before you choose. Ask what they will do for you, how often you will talk, which languages they speak, and how each facilitator works with your FMS.
- Ask your service coordinator for a list of the services authorized for you in the last 12 months. Also ask about any services your IPP team agreed to that you are not getting yet. Your budget starts from both. Your IPP team is the people who write your IPP (Individual Program Plan) with you at your planning meeting.

5 Budget and spending plan

At the meeting

- Go over how the budget works. If you already get regional center services, your individual budget starts from the services authorized for you in the most recent 12 months, plus services your IPP team agreed to that are not being provided yet.
- If your circumstances, needs or resources have changed, the IPP team can adjust the budget, and the reason is written in your IPP. If you get few or no services today, the IPP team must talk about your unmet needs. If you are new to the regional center, or have less than 12 months of services, the budget comes from the services and supports the IPP team finds you need.
- Your spending plan shows how you will use your budget for the services and supports tied to your goals. Help each other match each goal to its supports.

Homework before the next one

- Write down what has changed in your life since your last plan. DAN helps you put it into words your regional center can more easily say yes to.
- Work on your spending plan with your facilitator or your service coordinator.

6 Your first year

At the meeting

- Keep meeting once you are in SDP. Every month, your FMS sends you and your service coordinator a statement: how much is set for each part of your budget, what was spent in the last 30 days, and what is left.
- Bring what is working and what is not: hiring, schedules, invoices, finding providers. Someone on your team may have solved it already.
- SDP Companion, from the Self-Determination Tech Alliance, is a budget tool for people in SDP: it keeps track of your individual budget and spending plan through the year. If you want it, it can be paid from your SDP budget, through your FMS, as a line in your spending plan: sdta-np.com (About SDP Companion)

Homework before the next one

- Read your statement each month and check it against your spending plan.
- Mark the date of your next planning meeting, and start getting ready a few months before it.

After the first year, keep meeting. Welcome new people: someone just starting learns the most from someone a step ahead.

Ask a facilitator for an hour a month

An independent facilitator who knows SDP can help a whole team. Ask one to give your team an hour a month: sit in on a meeting and take the questions.

How to ask

- Find facilitators near you on Acierto IF: acierto-if.sdta-np.com. You can also ask at an advisory committee meeting.
- Say what you are asking for: one hour a month with your team, for general questions.
- The hour is a gift to the team. If a facilitator asks the team for money, do not pay.
- Send your questions ahead of time, so the hour goes to what your team needs most.
- The hour is for the whole team. Choosing a facilitator for your own plan is a separate choice, and each person makes it on their own.
- A facilitator is a guest at your meeting. Share only what you would share with a guest, and keep the roster with your team.

A note you can send

Hello. We are a team of [number] people in the [regional center] area, learning about the Self-Determination Program together. Would you give our team one hour a month, to sit in on a meeting and take our questions? We meet on [day and time], [in person at the place / on video]. Thank you for considering it!
[Your name]

Get ready with DAN

DAN, the Disability Access Navigator, answers your questions about all three choices and helps you write your planning meeting request.

Day or night, in English or Spanish. Free to people and their unpaid supports. No login.

Ask DAN: app.sdta-np.com

"Your life. Your plan. Your choice." comes to you from the Self-Determination Institute and the Self-Determination Tech Alliance, two nonprofits. Questions: support@sdta-np.com
This kit was last checked on October 24, 2026. It is general information. Ask your regional center how it applies to you.

Our team roster and plan

Write only what each person agrees to share. Keep this sheet with your team.

Team name

We meet on (day and time)

Where (a place, a phone number or a video link)

Leads the next meeting

Takes notes

Our facilitator for an hour a month

Name	Phone or email	Regional center	Language	Next step

Our meetings

Meeting	Date	Done
1. Get started		
2. Orientation together		
3. Plans side by side		
4. Find a facilitator and an FMS		
5. Budget and spending plan		
6. Your first year		

Help for every step: DAN: app.sdta-np.com · Person-centered plan: acierto-pcp.sdta-np.com · Orientation: scdd.ca.gov/sdp-orientation · Facilitators: acierto-if.sdta-np.com · FMS: acierto-fms.sdta-np.com · This kit: choices.sdta-np.com/team