

TABLE OF CONTENTS
Institute for Human Development at Northern Arizona University
ADDPC Comprehensive Review and Analysis (CRA)

Scope of Work 2
Budget Narrative..... 6
Budget Request Form 12

ADDPC Comprehensive Review and Analysis (CRA)

Scope of Work

Proposed Interagency Service Agreement Between the Arizona Developmental Disability Planning Council and Northern Arizona Universities Institute for Human Development.

Scope of Work Description

The CRA will result in a written document that provides a portrait of state services in the areas of healthcare, employment, informal and formal services and supports, interagency initiatives, and quality assurance (which includes safety and training in leadership, self-advocacy, and self-determination). For each of these an overview of the current programs, new initiatives, and statistics on use of the programs by people and families with Developmental Disabilities (DD) will be described. Additionally, a high-level overview of the state's offerings will be captured for the areas of education/early intervention, housing, transportation, childcare, and recreation. Phase One of the CRA will capture this information through publicly disseminated works (such as press releases, reports, and websites) and interviews with key stakeholders (including self-advocates) in each area.

To augment this understanding, two surveys will be administered during Phase Two. One to people with DD and their families/caregivers. This will target use of services and priority areas for improvement. A second survey will be administered to the community of grassroots organizations, stakeholders, and service providers. This survey will target local resources, programs, and initiatives. It will also capture perceived priority areas for improvement and elicit information on barriers experienced by people with DD who are not connected to statewide resources (such as DD services).

The final stage is to facilitate six to eight town halls or community conversations throughout the state. Strategies will be employed to encourage participation from a broad spectrum of Arizona residents—especially those from rural, tribal, and un- or underserved communities in addition to urban residents. These will be designed to determine if what was learned in Phase One matches the community's perceptions, learn about local initiatives, and learn about the areas of priority in the local community.

To complete the CRA, IHD will rely on ADDPC staff and council for resources with data collection, event scheduling and outreach. For more information, the attached document: "CRA Planning" captures the specific questions for each area that will be answered in this analysis.

Project Deliverables

The scope of work can be divided into three phases. Phase One captures the portrait of state services through public information and targeted interviews. A short report summarizing the findings will be developed to inform Phase Two and Phase Three.

Phase Two includes two surveys. These will result in one report summarizing the findings from both surveys.

Phase Three consists of the town halls/community conversations. These will result in a short report that summarizes the discussions of each meeting and aggregates it to capture the overall themes across each forum.

The final deliverable is the CRA. This will be formatted in a way that integrates the findings from all three phases and captures the connected nature of the focus areas. For example, healthcare and access to healthcare are closely related to employment, which in turn is related to housing. Key to the final report is the identification of the key challenges that the data suggests need to be addressed. This will provide a starting point for discussions on development of the state plan. It is recommended that ADDPC disseminate this report directly to stakeholders and people who provided input via surveys and the townhalls as well as post it on their website for public consumption.

Milestones

Completion of Phase One report (May 31, 2025)

Completion of Phase Two report (i.e., surveys) (July 31, 2025)

Completion of Phase Three report (i.e., town halls) (July 31, 2025)

Completion of CRA Report (September 30, 2025)

Reports

There will be three preliminary reports that summarize each phase of data collection. These are designed for internal use within ADDPC and will be shared with ADDPC leadership who can distribute them as they choose. These will be synthesized into a final report written in a way to be shared with outside parties as ADDPC chooses.

Additionally, monthly updates on progress will be provided to ADDPC in writing. ADDPC will be given the opportunity to meet and discuss them as they feel necessary.

Timeline

Note, this timeline has been developed with a goal to deliver the CRA by September 30, 2025. However, if more time is needed to complete some of the activities, we may adjust this timeline throughout the year to accommodate delivery of the final report no later than December 31, 2025.

During each monthly report the timeline will be discussed. If adjustments are made, an updated timeline will be included.

<i>Activity</i>	<i>When</i>	<i>Project Section</i>	<i>Who</i>
Obtain ADDPC approval to commence project	November 2024	All phases will get simultaneous approval	ADDPC
Identification of stakeholders	December 2024	Phase One Phase Two Phase Three	ADDPC with IHD
Web scraping and targeted interviews	January 2025 through March 2025	Phase One	IHD
Complete draft of Phase One report and share with stakeholders who were interviewed for comment	March 31, 2025 (share draft) Comments collected through April 30, 2025	Phase One	IHD (and stakeholders)
Design surveys	March 1, 2025 – April 30, 2025	Phase Two	IHD
Administer Surveys	May 1 – June 30, 2025	Phase Two	IHD
Conduct town halls	April 1 – June 30, 2025	Phase Three	IHD
<i>MILESTONE:</i> Phase One Report Complete	May 30, 2025	Phase One	IHD
Survey completed/closed	June 30, 2025	Phase Two	IHD
Town halls completed	June 30, 2025	Phase Three	IHD
<i>MILESTONE:</i> Phase Two (survey analysis) report completed and shared	July 31, 2025	Phase Two	IHD
<i>MILESTONE:</i> Phase Three (town hall) report completed and shared	August 15, 2025	Phase Three	IHD
Complete first draft of CRA for circulation	August 31, 2025 (share draft with ADDPC staff and IHD team) Comments collected through September 15, 2025	Final Report	IHD/ADDPC
<i>MILESTONE:</i> Completed CRA submitted to ADDPC	September 30, 2025	Final Report	IHD

Next Steps in State Plan Development

After conclusion of this scope of work, we anticipate performing another Scope of Work to facilitate development of the state plan and accompanying workplan. We plan to finish developing this SOW and accompanying budget so it can be discussed at the January 2025 ADDPC council meeting.

This will include guiding ADDPC through consideration of available resources and the needs identified in the CRA to identify strategic goals to be included in the state plan. ADDPC has expressed desire to scope these goals so they will make a meaningful impact in the next plan cycle. After these goals are established, we will work with ADDPC to navigate the public input processes to improve and finalize the state plan. We will also facilitate integrating CRA data with the state plan goals to develop goal objectives and the first two-year work plan. We'll align this process and deliverables with the requirements for plan submission to streamline the submission process. Last, we'll support ADDPC in community outreach to share how their feedback was heard during the CRA process, how that translated to the state plan goals, and opportunities for their communities to engage with ADDPC in execution of the state plan.

BUDGET NARRATIVE
Institute for Human Development at Northern Arizona University
ADDPC Needs Assessment
12-Month Budget: November 25, 2024 to December 31, 2025

Personnel/Salaries

Kelly D. Roberts, PhD, Principal Investigator

(Cash Match Salary \$9,576; Cash Match Fringe \$2,363)

Dr. Roberts has worked in the disability and health and human service fields for over 30 years. She earned her doctorate in education from the University of Hawai'i at Mānoa, with her dissertation focusing on learning disabilities and voice recognition assistive technology (AT). She holds a master's degree in special education and a bachelor's degree in secondary education. Dr. Roberts has extensive experience as an educator, researcher, and leader in the disability field. She is a former special education teacher and thus has a solid understanding of the educational needs of individuals with developmental and other disabilities. She has also worked in the child and adolescent mental health field, coordinating services for children and youth with mental health disorders.

Dr. Roberts is the executive director of the Institute for Human Development (IHD) at Northern Arizona University (NAU). Dr. Roberts will oversee the project and ensure the goals and objectives outlined in the narrative are met according to the project's timeline. She will engage with community stakeholders from across the state. The suggested level of commitment is appropriate for the scope of work required to fulfill the project's objectives. Dr. Roberts will contribute 5.19% effort, or 0.62 person months, to the project as cash match.

Total Cash Match Personnel Funds: \$11,939

Meghan Donahue, PhD, Evaluation Associate

(Requested Salary \$24,570; Fringe \$6,536)

(3.60 Annual Person Months, or 30% FTE)

Dr. Donahue joined the Institute for Human Development in August 2024 from Wisconsin's Department of Workforce Development where she provided research and evaluation services to support data-driven decision making. She earned her doctorate in Industrial and Systems Engineering focused on Human Factors from University at Buffalo with research that explored the relationships between Vocational Rehabilitation services and employment outcomes. Dr. Donahue's research and evaluation experience is rooted in nearly a decade of providing Rehabilitation Engineering and Assistive Technology services directly to people with disabilities. This experience drives her philosophy to include all levels of stakeholders in her evaluation approach to ensure meaningfulness at all levels. Dr. Donahue also has served on the Rehabilitation Engineering and Assistive Technology Society of North America (RESNA) Board of Directors and Executive Committee for several years where she was heavily involved in setting the strategic direction of the organization.

Dr. Donahue will apply her project management, research, and evaluation experience to lead this project. She will serve as project manager and lead the data collection and analysis necessary to complete the CRA as described in the scope of work. The suggested level of commitment is appropriate for the scope of work required to fulfill the project's objectives.

Kyle Beam, PhD, Project Editor

(Requested Salary \$3,674; Fringe \$1,937)

(0.60 Annual Person Months, or 5% FTE)

Dr. Beam has served as senior editor for the Institute for Human Development since February 2021 and previously worked as a copy editor for academic publications such as *The Review of Politics*, a scholarly journal published by the University of Notre Dame. He has over 15 years of experience with professional writing, as both author and editor. In his role as project editor, Dr. Beam will edit the content of the curriculum, project communications, products, tools, and other written materials. Dr. Beam has experience in social science research and data analysis and will assist the team with writing all reports. Editing needs are significant, given the many written components of the project. In addition, professional editing is critical to effective and useful dissemination. Dr. Beam is a dedicated and skilled professional editor, and as such is crucial to ensuring high-quality and culturally appropriate materials are produced in line with project objectives. In addition, Dr. Beam will create plain language versions of written materials as determined in collaboration with ADDPC personnel. The suggested level of commitment is appropriate for the scope of work required to fulfill the project's objectives.

Miles McDonald, MBA, Dissemination Director

(Requested Salary \$3,786; Fringe \$1,284)

(0.60 Annual Person Months, or 5% FTE)

Mr. McDonald is currently the Director of Dissemination at the Institute for Human Development. In this role, he leads the production and dissemination of the work of IHD at local, state, and national levels. To this role, he brings over 30 years of experience working in media and video production, audio engineering, editing and cinematography, technical directing and training, television producing and directing, website management, and a variety of other community focused leadership roles. For this project, Mr. McDonald will lead all dissemination and outreach activities, including ensuring digital accessibility. The suggested level of commitment is appropriate for the scope of work required to fulfill the project's objectives.

To-Be-Determined, Meeting Facilitators

(Requested Salary \$6,694; Fringe \$3,334)

(1.02 Annual Person Months, or 8.5% FTE)

Each of the project's eight townhall meetings will be facilitated by two IHD staff members. The meeting facilitators will be trained by Dr. Donahue to lead the meetings in a manner that is considered best practice. To provide a comfortable environment where all participants are free to speak, the event will not be recorded. One of the facilitators will be a dedicated note-taker to capture the discussion. The suggested level of commitment is appropriate for the scope of work required to fulfill the project's objectives. For budgeting purposes, the 8.5% effort or 1.02 person months needed for two meeting facilitators is listed once.

To-Be-Hired, Student Worker

(Requested Salary \$6,760; Fringe \$28)

(2.40 Annual Person Months, or 20% FTE)

During phase 1 this student worker will assist with document review and synthesis as well as interviews and conversations with stakeholders. They will also contribute to phase 2

where they will assist with survey design, data wrangling, and data analysis. To accomplish these objectives, the selected student will need to have experience in descriptive statistics, bivariate analysis, and conducting literature reviews. Priority will be given to applicants with backgrounds related to serving people with disabilities. While any student at NAU will be encouraged to apply, additional recruitment efforts will be targeted towards NAU's programs in mathematics and data analytics, social and behavioral sciences, education and counseling, and healthcare. The suggested level of commitment is appropriate for the scope of work required to fulfill the project's objectives.

To-Be-Hired, Student Worker

(Requested Salary \$6,760; Fringe \$28)

(2.40 Annual Person Months, or 20% FTE)

During phase 1 this student worker will assist with document review and synthesis as well as interviews and conversations with stakeholders. They will also contribute to phase 3 where they will assist with all components of this phase. Particularly they will work with logistics for each session, taking notes during the sessions and analysis of the qualitative data. This student should excel at qualitative data analysis and have a strong experience conducting literature reviews. Priority will be given to applicants with backgrounds related to serving people with disabilities. While any student at NAU will be encouraged to apply, additional recruitment efforts will be targeted towards NAU's programs in social and behavioral sciences, education and counseling, and communication. The suggested level of commitment is appropriate for the scope of work required to fulfill the project's objectives.

Fringe Benefits

The fringe benefit rates for NAU employees vary from person to person. Employee-related expenses (ERE) are rounded estimates based on the projected cost of health, dental, life, disability, FICA/Medicare, unemployment, and retirement benefits relative to the employee's salary and/or wages, FTE, and election of benefits. The employee's ERE rate is calculated by dividing his/her salary by the total cost of his/her benefit package. More information on NAU's fringe benefit rates can be found at: <https://in.nau.edu/osp/proposal-preparation-information/>

Staff Person	Salary*	Fringe Rate	Fringe Amount	Total Requested	Total Cash Match
Kelly Roberts	\$9,576	24.68%	\$2,363	\$-0-	\$11,939
Meghan Donahue	\$24,570	26.60%	\$6,536	\$31,106	\$-0-
Kyle Beam	\$3,674	52.71%	\$1,937	\$5,611	\$-0-
Miles McDonald	\$3,786	33.89%	\$1,284	\$5,070	\$-0-
TBD – Meeting Facilitator	\$6,694	49.80%	\$3,334	\$10,028	\$-0-
TBH – Student Worker	\$6,760	0.41%	\$28	\$6,788	\$-0-
TBH – Student Worker	\$6,760	0.41%	\$28	\$6,788	\$-0-
Totals	\$61,820	NA	\$15,510	\$65,391	\$11,939

*The University definition of a “Year” for budgeting and management of senior personnel compensation is the fiscal year (July 1 to June 30). Salaries are based on current salaries with a 5% cost escalation rate applied for expected 2025 cost-of-living (COL) and merit increases. The University defines academic salary based on 8.77 months, summer salary based on 3.23 months, and calendar salary based on 12 full months.

Total Requested Personnel Funds: \$65,391

Travel

Funds of \$5,025 are requested for the travel costs described below. Per NAU policy, the State of Arizona Accounting Manual (SAAM) was used to reference lodging and Meals and Incidental Expense (M&IE) rates by locale.

- Travel (In-State) - \$2,268 is estimated and requested for two staff to travel overnight to three to-be-determined rural communities to facilitate the project’s town hall meetings. The locations are expected to include Yuma, Page, Kayenta, and Window Rock. For budgeting purposes, SAAM rates for Kayenta are used.

Travel Item	Description	Amount
Lodging	\$146 per night x 3 nights x 2 travelers	\$876
M&IE	\$54 per day x 6 days x 2 travelers	\$648
Transportation Daily Rate	\$39 per day x 6 days x 2 vehicles	\$468
Transportation Mileage Cost	304 round trip miles x \$0.15 per mile x 3 trips x 2 vehicles	\$276
Total Cost for Overnight Trips		\$2,268

- Travel (In-State) - \$1,090 is estimated and requested for two staff to travel to five to-be-determined communities to facilitate the project’s townhall meetings. This travel is not expected to require overnight stays. The locations are expected to include Phoenix, one in Tucson, one in Flagstaff, and Kingman. However, final locations will be determined in collaboration with ADDPC personnel. For budgeting purposes, SAAM rates for Phoenix are used.

Travel Item	Description	Amount
M&IE	\$27 per day x 5 days x 2 travelers	\$270
Transportation Daily Rate	\$39 per day x 5 days x 2 vehicles	\$390
Transportation Mileage Cost	288 round trip miles x \$0.15 per mile x 5 trips x 2 vehicles	\$430
Total Cost for Day Trips		\$1,090

- Travel (Out-of-State) - \$1,667 is estimated and requested for Dr. Donohue, the project manager, to travel from Wisconsin to Arizona. Dr. Donohue will train staff at two townhall meetings and collaborate with project personnel. For budgeting purposes, SAAM rates for Phoenix are used.

Travel Item	Description	Amount
Airfare	\$650 round trip x 1 person	\$650
Lodging	\$157 per night, x 3 nights	\$471
M&IE	\$59 per day x 4 days	\$236
Transportation	\$210 total for 4 days	\$210
Miscellaneous	Parking, luggage, rideshare	\$100
Total Cost for Out-of-State Trip		\$1,667

Supplies

Funds of \$4,000 are requested for consumable project supplies and conference event materials. Project supplies and materials will facilitate the completion of the project's scope of work, deliverables, and townhall meetings. The supplies will be provided for staff and participants as needed to carry out project tasks and accomplish project goals. Expected supplies and materials include, but are not limited to, professional training tools and resources, office supplies, presentation materials, survey mailing supplies and postage, and printing.

Professional Services/Consultants:

Funds of \$13,074 are requested for the following interpretation and translation services:

- \$3,608 is requested for in-person interpretation services at the project's townhall meetings. The total requested amount is the result of the hourly cost for interpretation services and related travel costs for the interpreter. Interpreters are expected to provide two hours of service at \$125 per hour at each of the eight townhall meetings (2 hours per meeting x \$125 per hour x 8 meetings = \$2,000). Travel costs for the interpreter are budgeted using rates provided by LanguageLine Solutions, an NAU approved vendor and previously used service provider. Round trip mileage between Phoenix and Flagstaff was used to budget mileage (8 interpreter travel trips x 300 round trip miles x \$0.67 per mile = \$1,608).
- A total of \$7,216 is requested for in-person American Sign Language (ASL) and Mexican Sign Language (MSL) interpretation services at the upcoming town hall meetings. This budget request is for two ASL interpreters or two MSL interpreters to be at each town hall (16 interpreters total).
 - Interpretation Needs by Community:
 - In predominantly Spanish-speaking communities, MSL interpreters will likely be requested.
 - In predominantly English-speaking communities, ASL interpreters will likely be requested.
 - Interpretation Service Details:

Each interpreter will provide 2 hours of service per meeting at a rate of \$125 per hour, for a total of \$4,000 for all eight town halls (2 interpreters x 2 hours per meeting x \$125 per hour x 8 meetings = \$4,000).
 - Travel Costs:

Travel expenses are based on rates provided by LanguageLine Solutions, an NAU-approved vendor and previous service provider. The budget uses round-trip mileage between Phoenix and Flagstaff to estimate travel costs: (16 interpreter travel trips x 300 miles round trip x \$0.67 per mile = \$3,216).

- \$2,250 is requested for translation services to provide project materials in Spanish, Navajo, and possibly other languages. For budgeting purposes, 15,000 words of translation at \$0.15 per word is estimated (15,000 words x \$0.15 per word = \$2,250).

Other Expenses:

Funds of \$2,000 are requested for room rentals to provide the project's townhall meetings. The rooms are expected to be rented from hotels with conference rooms capable of facilitating the project's townhall meeting needs. Eight room rentals are budgeted for one day each at \$250 per day (8 rooms x 1 day each x \$250 per day = \$2,000).

Total Requested Direct Costs: \$89,490

Indirect Costs

Per Arizona Developmental Disabilities Planning Council (ADDPC) guidelines, indirect costs (IDC) are capped at 10% of allowable direct costs (\$89,490 direct costs x 10% IDC rate = \$8,949).

Total Requested Indirect Costs: \$8,949

Total Requested Direct & Indirect Costs: \$98,439

Cost share/ Match

ADDPC requires a 25% match of total project costs. The required match for this proposal is \$32,810. The following have been applied as cash match: the \$11,939 for Dr. Roberts contributed personnel costs; \$3,510 in IDC related to Dr. Roberts contributed personnel costs; and \$17,361 in unrecovered IDC resulting from the difference between NAU's 29.4% federally negotiated rate and ADDPC's 10% IDC rate ceiling applied to total requested direct costs ($\$89,490 \times 19.40\% = \$17,361$). Total match: \$11,939 contributed personnel costs + \$3,510 IDC on contributed personnel costs + \$17,361 unrecovered IDC = \$32,810.

Total Cash Match: \$32,810

Total Requested Costs & Cash Match: \$131,249

Budget Request Form

Contractor Name: Northern Arizona University

Contractor Address: 525 S. Beaver St Flagstaff AZ 86011
Street Address City State Zip

Project Name: ADDPC Comprehensive Review and Analysis (CRA)

Budget Category	Requested ADDPC Funds	Non-Federal Cash Match	Non-Federal In-Kind Match	Total Program Cost
Personnel/Salaries	52,244	9,576	-	61,820
Fringe Benefits	13,147	2,363	-	15,510
Supplies / Operating Expenses	4,000	-	-	4,000
Travel	5,025	-	-	5,025
Rent or Cost of Space	-	-	-	
Contracted Services / Professional Services	15,074	-	-	15,074
Administrative / Indirect Costs	8,949	20,871		29,820
Total Costs	98,439	32,810	-	131,249

It is understood that Non-Federal Funds identified in this budget will be used to match only ADDPC Federal Funds, and will not be used to match any other Federal Funds during the period of the ADDPC funded Project.

Additional description and background information shall be included as a budget narrative, including for match. The contractor agrees to submit additional background information to the ADDPC upon request.

Nicky Jurgens

Name of Certifying Official

Assistant Director, Pre-Award Research Administration

Title of Certifying Official

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