Arizona Developmental Disabilities Planning Council

Improving Self-Employment Outcomes for

Individuals with Developmental Disabilities Proposal

Updated April 28, 2014

Background – The State of Self-Employment Programs and Outcomes for Individuals with Developmental Disabilities

The mission of the Arizona Developmental Disabilities Planning Council (ADDPC) is to represent the interests and needs of persons with developmental disabilities, with particular attention dedicated to persons who are unserved or underserved throughout the State of Arizona. This overall mission includes the promotion of self-determination, independence, and dignity in all aspects of life for individuals with developmental disabilities.

Because individuals with developmental disabilities are disproportionately unemployed, underemployed, and living in poverty—both in Arizona and nationwide–ADDPC wishes to examine entrepreneurship and self-employment as a viable strategy for increasing their opportunities to participate in the labor force. Research shows that successful efforts in this area will benefit individual workers as well as contribute to Arizona's economic recovery. For example, a recent report from the National Governors Association presented strategies and recommendations for drawing upon the largely untapped pool of talent that individuals with disabilities represent. The report noted that individuals with disabilities are more likely than individuals without disabilities to own their own business—possibly due to the fact that self-employment provides flexibility in the workplace and work schedule, both of which are common barriers to full-time employment, as well as the greater earning potential—and cited examples of state programs that encourage and support entrepreneurship and self-employment among individuals with disabilities.

Additionally, recognizing that entrepreneurs drive America's economy and account for the majority of the nation's new job creation, many traditional public service providers such as vocational rehabilitation (VR), Small Business Development Centers (SBDCs) and Employment Assistance Programs (EAPs), and workforce development professionals are working to advance entrepreneurship and self-employment as an effective route to economic independence. These providers are collaborating with both public and private sector organizations to break down age-old barriers and ways of thinking. For example, individuals with disabilities may not be able to access the capital needed to start a business because they lack satisfactory credit or assets to use as collateral for a loan, or they may not have the information and resources they need to develop an effective business plan.

Strategies for addressing these issues include state certification of disability-owned businesses and entrepreneurship education programs. The latter are particularly appropriate for providers of youth-to-adult transitioning programs. Participants learn organizational and leadership skills, often by immersion in real-world learning experiences where they can take risks, manage the results, and learn from the outcomes. Another important benefit of these programs is the development of financial literacy, including information on available work incentives and the impact of business ownership on Social Security benefits.

In preparing this proposal, Partners In Brainstorms (PIB) engaged in a preliminary landscape scan to identify previously conducted research in this area, as well as sources of credible and relevant information on best practices for improving employment and self-employment outcomes and creating more opportunities for employed and self-employed participation in the workforce. PIB identified numerous information sources, including academic journals and newsletters; research and policy institutes; local, state, regional, and federal agencies; national advocacy organizations and professional associations; educational institutions; and more.

Project Work Plan

In developing the Project Work Plan for *Improving Self-Employment Outcomes for Individuals with Developmental Disabilities*, Partners In Brainstorms (PIB) drew on its extensive expertise in key learning from similar employment of individuals with disabilities research, and in strategic planning and consulting engagements for several State of Arizona agencies, councils, and boards, including the Arizona Department of Economic Security (DES), Arizona Employment and Rehabilitation Services (RSA), Vocational Rehabilitation (VR), Arizona Commerce Authority (ACA), Arizona Governor's Council on Workforce Development, Arizona Health Care Cost Containment System (AHCCCS), Arizona Employment and Disability Partnership (AEDP) and Arizona Department of Education (ADE).

Individuals with developmental disabilities who want to start their own business encounter the business-related challenges that any prospective entrepreneur must face: "How do I obtain financing?" "Who can assist me in writing a business plan?" "Is my business concept feasible?" Vocational counselors who assist prospective entrepreneurs with disabilities are sometimes unprepared to answer questions like these. On the other hand, Small Business Development Centers (SBDCs) and Employment Assistance Programs (EAPs), as well as individual business planning consultants, can assist with business plan development or provide guidance regarding financing, but they may not be prepared to help prospective entrepreneurs with other complex issues like Social Security benefits advisement and developing support systems to help assure a positive outcome.

Low self-employment rates can also be attributed to current misperceptions, including the belief that new small businesses have a high failure rate. The reality is that 7 out of 10 new employer firms survive at least two years, and about half survive five years. Despite these challenges, entrepreneurship may make sense for many more individuals with developmental disabilities in Arizona than those presently self-employed.

To increase the rate of self-employment among individuals with developmental disabilities and improve outcomes, PIB proposes the following approach over a two-year period:

Year 1

1. Work Plan
2. Identification of Best Practices for Self-Employment Programs for Individuals with Developmental Disabilities Across the United States
3. Identification and Analysis of Self-Employment Services in Arizona

Year 2

4. Focus Groups
5. Statewide Survey
6. Final Report and Executive Summary with Actionable Recommendations
7. Community Forums

Key deliverables including reports and summaries will be provided at the conclusion of each of the seven phases and deemed acceptable by ADDPC. At the end of Year 1, an assessment of the key insights from Phases 2 and 3 will be completed and any modifications to the scope and specific tasks for Year 2 (Phases 4 to 7) will be incorporated into an updated Work Plan for Year 2. The Work Plan for Year 2 will be presented to ADDPC for their approval, prior to the implementation of the second year of the project.

Partners In Brainstorms services proposed for ADDPC fall under the State of Arizona contract for Statewide Research and Survey Services – #ADSPO13-038340. This 5-year contract was awarded on December 24, 2012 after a year-long procurement and thorough review process of 42 firms (including 3 state universities) in six major categories including General Research, Economic Research, Strategic Business Planning and Policy Development, and Population-Related Research (e.g. individual with disabilities). Among the 42 submitted proposals, Partners In Brainstorms received the top score in all 6 of 6 categories, and was identified as the best value overall.

Year 1: Phase 1

Phase	Description	Cash Budget	Matching Funds	Total
1	**Work Plan** PIB will develop a comprehensive work plan that provides a detailed methodology for Year 1 (Phases 2 and 3) and Year 2 (Phases 4 through 7). Key deliverables, including reports and summaries, will be provided at the conclusion of each of the seven phases, and deemed acceptable by ADDPC. At the end of Year 1, an assessment of the key insights from Phases 2 and 3 will be completed, and any modifications to the scope and specific tasks for Year 2 (Phases 4 to 7) will be incorporated into an updated Work Plan for Year 2. The work plan will serve as a roadmap for both ADDPC and PIB throughout the duration of the project. ***Deliverable***: A detailed work plan for Years 1 and 2 will be created, outlining the proposed methodology, deliverables, timetable, and budget, and prepared in accordance with ADDPC requirements.	$ 2,995.00	$ 998.33	$ 3,993.33

Year 1: Phase 2

Phase	Description	Cash Budget	Matching Funds	Total
2	**Identification of Best Practices for Self-Employment Programs for Individuals with Developmental Disabilities Across the U.S.** PIB will conduct extensive and thorough reviews and one-to-one interviews with self-employment program directors throughout the county to explore the following key areas: •Review of existing research on self-employment among individuals with disabilities, including demographic and prevalence data, potential policy issues, and partnership models, including programs for transition-aged youth offered at the school district level. • Review of programs in other states and follow-up interviews with key self-employment program directors, during which successes and failures and the contributing factors will be identified, along with funding sources used to develop, launch, maintain, and expand the programs. • Resources and information available from advocacy organizations, professional associations, research and policy institutes, governmental agencies, educational institutions, etc. • Supporting evidence for best practices, including criteria and outcome goals used to measure success. To obtain this information, PIB will access its digital research library composed of nearly two billion records in 600 databases that include research studies. ***Deliverable:*** A summary of best practices, lessons learned, and other key insights obtained from the literature search, existing research studies and interviews with key stakeholders from other states will be prepared for ADDPC. The information will be concisely summarized into a grid which references "model" programs based on key criteria and essential components.	$ 22,995.00	$ 7,665.00	$ 30,660.00

Year 1: Phase 3

Phase	Description	Cash Budget	Matching Funds	Total
3	**Identification and Analysis of Current Self-Employment Services in Arizona** Identify sources and family supports currently offered in Arizona. These may include federal, state and local providers (e.g. Small Business Association, DES, One-Stop Centers, school districts, Arizona Small Business Development Centers, advocacy groups, etc.) and the specific services and resources offered by each provider to the individual and/or family or caregiver of the individual with developmental disabilities. These services may include: • Initial assessment to better understand individuals strengths, interest and entrepreneurship aspirations • Access to resources, training and consultation starting in high school through adulthood • Initial start-up and ongoing financial support • Transportation • Additional considerations. ***Deliverable:*** PIB will prepare a report of Self-Employment programs offered within Arizona, and identify the criteria for inclusion in the program, including stated income levels, age, geographical service area, disability, etc. A state map and a quick reference grid will be created that illustrates the service areas by city and county.	$ 22,995.00	$ 7,665.00	$ 30,660.00
	TOTAL FOR YEAR 1	**$ 48,985.00**	**$16,328.33**	**$ 65,313.33**

Year 2: Phase 4

Phase	Description	Cash Budget	Matching Funds	Total
4	**Focus Groups** Conduct 5 to 6 focus groups and one-on-one interviews throughout the state with key self-employment stakeholders, program leaders, advocates and individuals and family members with developmental disabilities. At least 50% of the focus groups will be conducted with unserved and underserved populations including rural communities and Tribal Nations. Identify gaps in services. Costs include stipends for transportation and other out-of-pocket costs. PIB will leverage opportunities to interview key groups at scheduled state-wide events (i.e. Arizona's Annual Transition Conference). ***Deliverable:*** A summary of the key findings and insights obtained from the focus groups and interviews with key stakeholders and program / service leaders in Arizona will be prepared. Information and insights in this summary will lay the groundwork for the statewide survey of individuals with disabilities (Phase 5).	$ 32,995.00	$10,998.33	$ 43,993.33

Year 2: Phase 5

Phase	Description	Cash Budget	Matching Funds	Total
5	**Statewide Survey** Based on key learning from Phases 2 to 4, PIB will implement a statewide survey of individuals with developmental disabilities and their caregivers/family members. The goal of this statewide survey is to reach communities throughout the state, including those that are unserved or underserved, to better understand the specific interests and aspirations; needed supports and resources to launch, grow, and sustain their business; specific type of business (by sector, service, product, etc.) they would be most interested in starting; etc. The survey will be offered online as well as in multiple formats to accommodate the needs of participants. ***Deliverable:*** A report will be prepared summarizing the survey key findings and presented to ADDPC. PIB will also provide "cross-tabulations" of the data so to review results by age, gender, disability, county and other key factors.	$ 22,995.00	$ 7,665.00	$ 30,660.00

Year 2: Phase 6

Phase	Description	Cash Budget	Matching Funds	Total
6	**Final Report and Executive Summary / White Paper with Actionable Recommendations** All information obtained in completing the previous phases and deliverables will be reviewed and analyzed to identify best practices related to improving self-employment outcomes for individuals with developmental disabilities. Actionable recommendations based on this analysis will be included in the final report which may include such areas as: (1) Examining and adopting self-employment models that have worked in other states (2) Providing counselors and disability services providers with training needed to incorporate self-employment best practices (3) Addressing policy issues (4) Strengthening interagency support for self-employment (5) Exploring blended funding mechanisms for business start-up and expansion funding, including both public and private funding (6) Developing a framework that could be used in clearly defining the scope and key components needed for potential self-employment grants to be awarded by ADDCP in the future, etc. ***Deliverable:*** Partners In Brainstorms will produce a final report that includes an executive summary of 1,000 words or less, an introduction, all previously approved writings documenting each phase, a thorough analysis of the research and findings from previous phases of the project, actionable recommendations, a guide for services currently being offered throughout the state, and suggested components for a "tool kit" that will serve as a resource to help improve outcomes of Self Employment for individuals with developmental disabilities.	$ 12,995.00	$ 4,331.67	$ 17,326.67

Year 2: Phase 7

Phase	Description	Cash Budget	Matching Funds	Total
7	**Community Forums** PIB will prepare a PowerPoint presentation and conduct a series of 3 to 4 community forums with key stakeholders, partners, advocacy groups, etc. The targeted community forums will be determined by ADDPC. The community forums will address a summary of the research and document resources, best practices, and recommendations for improving self-employment outcomes within Arizona. ***Deliverable:*** Partners In Brainstorms will produce a PowerPoint presentation and facilitate a series of community forums.	$ 6,995.00	$ 2,331.67	$ 9,326.67
	TOTAL FOR YEAR 2	**$ 75,980.00**	**$25,326.67**	**$101,306.67**

Contact

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Partners In Brainstorms Profile – Expertise and Experience

Partners In Brainstorms, Inc. (PIB) is a wholly female-owned small business providing strategic research, planning, communication, and marketing services to organizations in both the public and private sectors. Since our founding in 1991, we have been assisting client organizations by providing insights into their stakeholders' and customers' information and service needs; awareness and attitudes; and perceptions, motivations, and behaviors, along with applying these insights to help our clients strategically develop, promote, and/or reposition proactive programs and services to meet their stakeholders' and customers' current needs and respond to developing trends. Our client list includes the following government agencies, nonprofit organizations, and corporations:

STATE OF ARIZONA	EXECUTIVE GOVERNMENT
• Arizona Child Care Administration	• The White House
• Arizona Commerce Authority	**FEDERAL GOVERNMENT**
• Arizona Department of Economic Security (including Rehabilitation Services Administration, Employment Administration)	• U.S. Department of Commerce (U.S. Census Bureau)
• Arizona Department of Education	• U.S. Department of Education
• Arizona Department of Gaming	**CORPORATIONS AND ASSOCIATIONS**
• Arizona Department of Health Services	• 3M
• Arizona Department of Transportation	• Girl Scouts of the USA
• Arizona Employment and Disability Partnership	• Houghton-Mifflin Harcourt (The Learning Company)
• Arizona Game and Fish Department	• K-12 Inc.
• Arizona Governor's Council on Workforce Policy	• LEGO
• Arizona Health Care Cost Containment System (AHCCCS)	• McGraw-Hill
• Arizona Lottery	• Microsoft
• Arizona Registrar of Contractors	• National Education Association
• Governor of Arizona, Office for Children, Youth & Families	• Universal Studios

PIB has designed and implemented numerous needs assessment research projects.

- PIB has designed and conducted a number of research projects for the Arizona Department of Economic Security's Rehabilitation Services Administration (RSA). One of the most extensive was the federally required triennial State Needs Assessment Program (SNAP) of persons with disabilities. At the RSA's request, the original data collection project was expanded to serve strategic planning and other purposes. To

meet the federal requirements as well as the agency's additional needs, PIB's work plan included: (1) design and implementation of three online surveys for primary data collection; (2) data collection and secondary research from more than 100 sources; and (3) mining of statistical data across 12 data sets from large and disparate data files. Additionally, to provide RSA staff with an easy-to-navigate tool for accessing state and national data research data related to employment and independent living needs among individuals with disabilities, PIB designed an extensive and searchable Access database to house the newly compiled resource and reference data consisting of over 200 federal and state reports, studies, etc.

- For the Arizona Employment and Disability Partnership (AEDP), a federally funded Medicaid Infrastructure Grant administered by the Arizona Health Care Cost Containment System (AHCCCS), Partners In Brainstorms was engaged to provide program evaluation and customer satisfaction research services for several project initiatives, including an evaluation of the state's Freedom to Work (FTW) program. PIB implemented a participant satisfaction survey and conducted an extensive analysis of the participant (customer) database to develop demographic profiles of various customer groups (e.g., new, current, and former participants) and examine how well the program served their needs.

PIB has an extensive history of innovation in research and data collection technologies.

Several of our national clients, leaders in technology development and applications, make extensive use of interactive media to market their products and services. They expect the same from PIB when we implement primary research or obtain feedback from the public or customers, and they rely on our proven track record for keeping abreast of new technology developments that can be used to enhance and streamline the data collection and analysis processes while reducing client costs. To that end, Partners In Brainstorms leads the research industry in the use of new technologies for data collection.

- ***Online survey technology.*** PIB's history with the online survey began in 1996 while working with Microsoft and MSN. Today the technology that drives interactive online survey instruments is fairly commonplace, but at that time it was not available in any form, nor even considered possible. Chuck O'Donnell, our Manager of Technology and Programming, developed the technology (U.S. Patent Number 6,032,177) and implemented the proprietary survey engine that enabled researchers to move their telephone-based projects to the Internet and incorporate decision tree methods. All Internet-based surveys use the technology defined by this patent.
- ***Online research tools meet or exceed standards for Section 508 compliance.*** The 1998 amendment of Section 508 of the Rehabilitation Act requires federal agencies to make electronic and information technology accessible to people with disabilities. Section 508 was enacted to eliminate barriers in information technology, to make available new opportunities for people with disabilities, and to encourage development of technologies that help achieve these goals. State and local agencies are typically

required to ensure that programs receiving federal funding are also compliant with Section 508 requirements.

- ***Online focus groups.*** PIB has conducted numerous online focus groups using a unique, engaging, and proprietary web-based platform that offers a variety of Web 2.0 tools permitting the same kinds of interactive activities as an in-person group. Up to 25 respondents can participate, clients can also log in as observers, and the entire session is recorded – all at a fraction of the cost of a traditional, in-person focus group that has the inherent limitation of recruiting participants only from the market that was selected as the focus group location.
- ***Multicultural / bilingual experience.*** Many of our clients request that interviews, focus groups, and/or survey questionnaires be offered in Spanish as well as English. Our staff includes two focus group moderators who are native Spanish speakers, and these individuals also provide Spanish translation for survey questionnaires and other data collection instruments as needed.

Project Team Members

The academic and professional credentials of the Partners In Brainstorms (PIB) staff represent a range of disciplines as well as decades of experience and demonstrated expertise in utilizing a variety of qualitative and quantitative methodologies in designing and implementing research studies, database analyses, and program and process evaluations.

Debra Pryor, President & CEO – Executive Project Director – *Ph.D. Candidate, MSA, MBA*
Twenty-five years of experience in research and evaluation of programs, products, and services. Committed to developing programs based on a foundation of scientifically sound research, Debra has developed and supervised hundreds of research and evaluation studies. She combines research expertise with strategic business insight to provide clients with recommendations leading to improved performance and outcomes. Organizes, directs, and manages company operations and allocation of personnel and resources; authorized to negotiate and make binding decisions on behalf of the company, including signatory authority. Oversees and manages contract services; serves as a senior-level liaison with project managers and contract and program officers. She earned an MBA and a master's degree in integrated communication, respectively, from Northwestern University's prestigious Kellogg School of Management and Medill School, and recently completed the Global Leadership Program at Thunderbird School of Global Management.

Diane Hart Ginn, Vice President – Project Director – *MBA Candidate*
Twenty-five years of experience in all phases of marketing research from questionnaire design through analysis. Diane has unique expertise in key areas of research, program evaluation and database development and analysis. Coordinates phases and ensures contract fulfillment, quality work, and client satisfaction. Manages multiple personnel assigned to a project, including research managers and evaluators, interviewers, database specialists, technology and programming specialists, and other support personnel. Assigns, schedules, and reviews work of the assigned project team. Prepares and presents plans, documents, presentations, and other high-level material for meetings with client and other organizations participating in the project. Interfaces with client contact, senior managers, cooperating agencies, and other stakeholders, and is skilled in facilitating consensus building when necessary. Diane is an MBA candidate at the University of Illinois – Chicago.

Johanna Nelson – Sr. Manager and Certified Small Business Advisor – Research and Strategic Small Business Planning Project Leader – *MBA*
Eight years of experience in the small business arena, including serving as a Certified Business Advisor II through the Small Business Development Center Network in El Paso which was recently acknowledge as the top SBDC in the country. Johanna has significant experience working within government and knowledge of municipal operations and budgeting processes, including serving on the Alpine, Texas City Council. As a previous small business owner, she has proven entrepreneurial capabilities and community leadership. Johanna has extensive experience working with small businesses, governmental agencies, non-profits, community

organizations, and individuals with disabilities as a small business advocate. She earned an MBA from the University of Texas.

Kathleen Pryor – Sr. Manager of Research – Field Director – *BA*
Twelve years' experience in coordinating and managing research studies and special programs. Kathleen manages local and national research studies, including in-person and online focus groups, interviews and surveys, and oversees client services. She holds a bachelor's degree from Florida State University.

Deborah Meyers – Sr. Research & Writer / Editor – Project Associate – *MS candidate*
Deborah's diverse 35 years of experience include designing and implementing organization research and communication programs, developing data collection instruments, and preparing comprehensive research reports and presentations for multiple audiences. She holds a bachelor's degree in psychology and is pursuing a master's degree in English education.

Chuck O'Donnell – Sr. Project Manager, Research Technology – Project Associate – *MBA*
Over 25 years' experience in the technology and research programming field. Chuck is credited with developing the technology and online survey engine that enabled researchers to move their CATI and CAPI projects to the Internet. Designed and wrote the bulk of the survey software used by PIB, including the survey engine and database, all reporting and data generation software, and the electronic mail system. Developed and maintains a customized, targeted panel database to support PIB clients' needs. Chuck earned both his undergraduate and MBA degrees from the University of Connecticut.

Dawn Volkman – Research and Technology Specialist – Technology & Programming – Coding Supervisor – *MA*
With over 12 years of experience in programming, analysis, and project management, Dawn manages the data processing and IT functions. She earned her master's degree from Purdue University and her bachelor's in education and research from the University of Wisconsin-Madison.

Reetu Dhar – Research and Technology Specialist – Technology & Programming – Coding Supervisor – *MS, MBA*
Reetu is responsible for coding and programming. She earned a bachelor's in engineering and M.B.A in India before relocating to the U.S., where she earned a master's in computer science from Southern Connecticut State University.

W. Ronald Ginn – Chief Programmer & Database Manager – Database Processing Manager – *MS*
Thirty years of experience in the design and implementation of database systems to support variety of IT projects. He manages database projects to ensure timely completion, including overseeing the design and implementation of database systems to support various IT projects. Manages other database-related functions, including determining system requirements, hardware limitations, and operating requirements for database development. Collaborates with

quality assurance and production teams for the design, development, and testing of database systems throughout project. Ron holds a master's degree in mathematics from the University of Alabama.

William Goebel – Statistician and Research Manager – Data Processing Manager – *MA*
Twenty years' experience in statistical analysis, tabulation programming, and database management and programming services. Bill performs extensive data analysis and prepares data tables and real-time reports that are easy for PIB clients to access and comprehend. Responsible for administration and documentation of database projects. Ensures that designed systems provide sufficient controlled avenues for access to and update of the database, and provides interface protocols. Ensures the currency, accuracy, and integrity of the database. Provides highly technical expertise in the use of database management systems. Defines file organization, indexing methods, and security procedures for specific applications. Supports complex analysis of data. Bill is pursuing a master's degree in psychology.

Jennifer Caughlin – Research Psychologist & Facilitator/Moderator – General Research – *PhD*
Dr. Caughlin's 30+ years of experience in psychological research allow her to capture the subtle nuances of respondents' opinions and reactions. She is highly respected for her natural ability to converse easily with research participants representing all ages and walks of life – executives, employees, consumers, parents, educators, and children. She develops, conducts, and oversees a variety of qualitative research projects for organizations in the private and public sectors.

Steve Van der Linden – Finance & Contract Manager – Project Associate – *BA*
With over ten years' experience in the accounting and contract management field, Steve assists in the management and supervision of the finance area, coordinates and maintains the Advantage accounting program, and prepares detailed reports of operations and transaction activities. He earned his BA from the University of Arizona.

Jessica Larsen – Clerical Support/ Data Entry – Clerical Staff – *BA*
Over 4 years' experience in administration and research support services including transcription, data entry, and telephone interviews, etc.

Year 1: Key Phase and Deliverable Product	Cash Budget	Matching Funds	Total
Phase 1: Refine work plan.	$ **2,994.08**	$ 998.32	$ 3,993.28
Phase 2: Identify best practices through a comprehensive literature search, analysis of existing research studies, and interviews with key stakeholders throughout the United States.	$ **22,994.96**	$ 7,664.99	$ 30,659.95
Phase 3: Identify sources and family supports currently offered in Arizona.	$ **22,995.08**	$ 7,665.03	$ 30,660.11
Total	$ **48,985.00**	$ 16,328.33	$ 65,313.33

Budget / Price Sheet (By Labor Classification Per Master State of Arizona Contract ADSPO13-038340)

PARTNERS IN BRAINSTORMS, INC. STAFF / KEY PERSONNEL					COSTS BY PHASE FOR YEAR 1 BY PIB TEAM MEMBER								
						PHASE 1 Work Plan		PHASE 2 Best Practices		PHASE 3 AZ SE Services			
#	Name	Title	Labor Classification	Item #	Hourly Rate	Hours	Total	Hours	Total	Hours	Total	Total Hours	Total Costs
Project Management and Research Professional													
1	Pryor, Debra *(Ph.D. Candidate, MBA, MSA)*	President & CEO	Exec Project Director	2	$ 99.50	10.00	$ 995.00	65.00	$ 6,467.50	57.00	$ 5,671.50	132.00	$ 13,134.00
2	Hart Ginn, Diane *(MBA)*	Vice President	Project Director	2	$ 99.50	8.50	$ 845.75	40.00	$ 3,980.00	42.00	$ 4,179.00	90.50	$ 9,004.75
3	Nelson, Johanna (MBA)	Project Manager, Certified Small Business Manager	Project Leader	11	$ 99.50			86.50	$ 8,606.75	84.00	$ 8,358.00	170.50	$ 16,964.75
4	Pryor, Kathleen *(BA)*	Manager, Research	Field Director	5	$ 78.00		$ -	10.00	$ 780.00	21.00	$ 1,638.00	31.00	$ 2,418.00
5	Meyers, Deborah *(MS Candidate)*	Sr Researcher & Writer / Editor	Project Associate	3	$ 85.00	10.00	$ 850.00	24.00	$ 2,040.00	25.00	$ 2,125.00	59.00	$ 5,015.00
6	O'Donnell, Chuck *(MBA)*	Sr. Project Manager, Research Technology	Project Associate	3	$ 85.00		$ -		$ -		$ -	0.00	$ -
7	Volkman, Dawn *(MA)*	Research & Technology Specialist	Coding Supervisor	7	$ 58.00		$ -		$ -		$ -	0.00	$ -
8	Dhar, Reetu *(MBA)*	Research & Technology Specialist	Coding Supervisor	7	$ 58.00		$ -		$ -		$ -	0.00	$ -
9	Ginn, W. Ronald *(MA)*	Chief Programmer & Database Mgr	Database Processing Manager	4	$ 88.50		$ -	5.50	$ 486.75	5.25	$ 464.63	10.75	$ 951.38
10	Goebel, William *(MA)*	Statistician and Research Manager	Database Processing Manager	4	$ 88.50		$ -		$ -		$ -	0.00	$ -
11	Jennifer Caughlin *(PhD)*	Research Psychologist & Facilitator	General Research	11	$ 99.50		$ -		$ -		$ -	0.00	$ -
Managerial													
12	Van der Linden, Steve *(BA)*	Finance Mgr (Acct & Contract Management)	Project Associate	3	$ 85.00	2.25	$ 191.25	5.00	$ 425.00	4.75	$ 403.75	12.00	$ 1,020.00
Support Staff													
13	Larsen, Jessica *(BA)*	Clerical Support / Data Entry	Clerical Staff	14	$ 32.00	3.53	$ 112.96	6.53	$ 208.96	4.85	$ 155.20	14.91	$ 477.12
Totals						34.28	$ 2,994.96	242.53	$ 22,994.96	243.85	$ 22,995.08	520.66	$ 48,985.00

State of Arizona Contract for Statewide Research and Survey Services - #ADSPO13-038340

Partners In Brainstorms services proposed for ADDCP fall under the **State of Arizona contract for Statewide Research and Survey Services – #ADSPO13-038340**. This 5-year contract was awarded on December 24, 2012 after a year-long procurement and thorough review process of 42 firms (including 3 state universities) in six major categories including **General Research, Economic Research, Strategic Business Planning and Policy Development, and Population-Related Research (e.g. individual with disabilities).** Among the 42 submitted proposals, Partners In Brainstorms received the top score in all 6 of 6 categories, and was identified as the best value overall.

3.1. <u>General Research Types</u>

- 3.1.1. Statistical, quantitative and qualitative research as required by specific projects
- 3.1.2 Economic Research, Analysis and Trends as required by specific agencies
- 3.1.3 Strategic business planning including customer/employee satisfaction and needs assessments
- 3.1.4 Financial planning, forecasting, policy analysis, studies and project reviews

3.2 <u>Economic Research</u>

- 3.2.1 Economic/fiscal impact research; conduct research on Arizona's competitiveness, infrastructure, economic composition, growth, labor force, public-private sector investments , economic trends and other community development issues as required by the requestor.
- 3.2.2 Market research on business and economic trends
- 3.2.3 Operations research such as workforce and labor market analysis
- 3.2.4 Program evaluation, data collection and analysis related to specific projects as needed
- 3.2.5 Policy development research, write reports and present findings based on research/modeling activities
- 3.2.6 Customer and/or employee satisfaction research, development and projected outcomes
- 3.2.7 Needs assessments based on revenue/cost forecasts including models and auditing of results
- 3.2.8 Focus groups to assess risk and financial feasibility studies and fiscal impact probabilities

3.3 <u>Strategic Business Planning and Policy Development</u>

- 3.3.1 Strategic planning of long-term business strategies and analysis of strategic plans
- 3.3.2 Policy formulation/development by providing research in support of current and emerging public issues
- 3.3.3 Legislative support, policy analysis, and studies as required by the requestor
- 3.3.4 Planning for Organizations/Municipalities/Local Governments including development of operational performance measurements and benchmarks

3.4 <u>Economic Analysis and Financial Planning</u>

- 3.4.1 Financial planning, analysis and general research
- 3.4.2 Financial management and evaluation of cost structures
- 3.4.3 Infrastructure financing and development of financial strategies
- 3.4.4 Economic forecasting and/or modeling including market and survey research
- 3.4.5 Forecast Auditing and results management tools
- 3.4.6 Economic/fiscal impact analysis and studies
- 3.4.7 Economic research, analysis and trends of business fluctuations and projected growth patterns
- 3.4.8 Opinion Polls and public attitudes relating to Public trends and continuing issues

3.4.9 Strategic Business Planning
- 3.4.9.1. Economic/financial impact surveys
- 3.4.9.2. Market Analysis
- 3.4.9.3. Program evaluation and determination
- 3.4.9.4. Program planning and development
- 3.4.9.5. Policy development
- 3.4.9.6. Customer and/or employee satisfaction assessments
- 3.4.9.7. Public needs assessments and projections

3.5 **Population Related Research**

3.5.1. Estimation of the size of the total population and household population through census or survey

3.5.2 Estimation of the size of various special populations through census, survey or administrative records. Examples of special population include, but are not limited to, population of a certain age group. Population in certain types of group quarters, population with special needs.

3.5.3. Estimation of vacancy rates of residential housing units and estimation of persons per housing unit through the use of original sample survey, or analysis of secondary data sets that are publicly or commercially available.

3.5.4 Estimation of movement of population over a period of time (e.g. one year) through the use of sample surveys or analysis of public data

3.5.5 Analysis of the history and future trends of population change and components of change (fertility, mortality, and migration)

1.5.6 Research and development that helps improve the methods and data for population estimate and projections

3.5.7 Evaluation and study of programs relating to families and children

3.5.8 Collection and analysis of population related data required by funding sources for Arizona Departments, Agencies and Boards

3.6 **Travel Industry Related Research**

3.6.1 Visitor Identity
- 3.6.1.1 Visitor Profile studies
- 3.6.1.2 Visitor Volume estimates
- 3.6.1.3 Economic Impact Studies

3.6.2 Market Research

3.6.3 Opinion/Attitude Studies

3.6.4 Consumer Awareness

3.6.5 Competitive Analysis
- 3.6.5.1 Image
- 3.6.5.2 Perceptual Mapping Study

3.6.6 Program Effectiveness
- 3.6.6.1 Advertising Effectiveness/Return on Investment
- 3.6.6.2 Advertising Copy/Creative Testing

3.6.7 Website Specific Studies
- 3.6.7.1 User survey and satisfaction
- 3.6.7.2 Competitive analysis
- 3.6.7.3 Return on Investment Studies