

SCOPE OF WORK

Section I: Eligibility & Availability of Funds

Applicants must have experience in working with self-advocates/or like groups. In addition, applicants must have expertise in the Tasks and Strategies that are listed in this Scope of Work. Applicants proposing multiple locations to serve shall submit one application and address the requirements as stated in the Scope of Work and include all costs on the required budget forms.

This solicitation is open to the following organizations/agencies:

- Self-advocacy or like groups that are identified as non-profit or for-profit;
- Other non-profit or for-profit organizations that work with and support local self-advocacy or like groups;
- Government agencies;
- Or a combination of the above.

Funds Available: The total amount of funds available for awards is \$300,000 for the first year. Multiple awards shall be made and the ADDPC has the right to negotiate any part of the submitted application and budget, if necessary, during the evaluation process (see ADDPC Terms and Conditions for further information).

Section II: Purpose

The Arizona Developmental Disabilities Planning Council (ADDPC), in developing its 2012-2016 Five-Year State Plan, identified Self-Advocacy as a key area of concern voiced by consumers, parents and professionals. Specifically, it was noted that persons with developmental disabilities in Arizona are actively seeking to represent their own interests by functioning as self-advocates as opposed to having others act on their behalf. Based on this, the ADDPC created the following Goal as part of its State Plan:

GOAL: Build a self-advocacy alliance comprised of diverse advocacy organizations that is led by persons with developmental disabilities.

In working to accomplish this Goal, the Council completed the following:

- Completion of "Report on Self-Advocacy in Arizona" which surveyed existing self-advocacy groups to identify entities and also assesses development and sustainability needs expressed by organizations.
- Amended the State Plan to update objectives under the Self-Advocacy Goal, enabling the ADDPC to proceed with ongoing activities.

As part of amending the State Plan, the ADDPC recognized the importance of strengthening existing and identifying new self-advocacy organizations as a prerequisite to developing a state-wide alliance. As a result, the following Objectives were created to encompass the necessary steps in supporting self-advocacy efforts in the state. **Applicant shall address one or multiple Objectives**, as stated below.

Self-Advocacy Objectives:

1. Enhance the leadership capacity of self-advocates and increase their involvement in civic and other leadership activities.
2. Strengthen the capacity of self-advocacy organizations to promote systems change.
3. Build capacity for self-advocacy in underserved and unserved areas of the state.

Section III: Tasks/Intent of Request for Grant Application (RFGA)

The ADDPC seeks to work with multiple grantees across Arizona to conduct outreach, build relationships and develop components of training and technical support that will develop and strengthen existing and new self-advocacy organizations to function effectively in carrying forward self-advocates interests and needs.

Over the span of the contract period, grantees will lay the foundation of a future statewide alliance through technical support enabling existing and new self-advocacy organizations to function independently and create internal and external supports that maintain viability and sustainability.

To work towards the ADDPC's Goal, Applicants shall clearly state in their application which Objective(s) will be the focus. Applicants shall conduct and describe, in a narrative format, how each of the following Tasks will be accomplished and briefly state prior/current experience in accomplishing each of the Tasks.

1. Applicant shall have the knowledge, expertise and capacity to be effective in outreach and work in underserved and un-served areas of the state, both urban and rural.
2. Applicant shall have competencies in providing instruction and training including important topic areas such as leadership, organizational design and structure, budget management, and skills in fundraising.
3. Applicant shall develop and implement activities that are culturally and linguistically responsive and sensitive.
4. Applicant shall address transportation barriers with solutions that lead self-advocates to having the desired services, supports and engagement in SA organizations (i.e. attendance at training meetings).
5. Applicant shall develop or use existing training curriculum in self-advocacy, leadership development, and communication skills within the leadership of self-advocacy groups (such as curriculum supported by the Council).
6. Applicant shall support peer training, mentoring and leadership development (i.e. serving on other community boards/committees)
7. Applicant shall strengthen partnerships with other disability organizations and allies that will ultimately lead to creating a statewide self-advocacy alliance.
8. Applicant shall reach out and communicate with other self-advocates that are underrepresented in the self-advocacy movement, and/or that live in underserved or unserved communities.
9. Applicant shall implement evaluation methods to track output and outcome data that supports the self-advocacy objectives, and follow the evaluation templates included as part of the RFGA. Evaluation is the ability to assess organizational and individual member needs that when strengthened lead to improved organizational performance to reflect self-advocacy issues and bring about increased capacity and systems change.
10. Applicant shall have the ability to organize, facilitate and report on focus groups, public forums and other group activities.
11. Applicant shall have the ability to gather, organize, analyze and record data to make informed choices about self-advocacy activities and involvement in their community.
12. Applicant shall have the ability to manage grant funds per accounting and best practice standards, including the design and implementation of a financial system to award mini-grants in amount of \$5-10K to the identified self-advocacy groups that will enable and assist them in organizational development.

13. Applicant shall have the ability to network with other grantees awarded under this RFGA to develop continuity and consistency in moving toward the development of a statewide self-advocacy alliance.

Section IV: Strategies

In a narrative format, identify the strategies from the list below and describe why they were chosen and how they will be implemented to support the Self-Advocacy Objective(s) that have been chosen. In developing your narrative under this section, applicants may use one or more various strategies or propose new strategies. At a minimum, strategies that are *italic* must be used. This is not a comprehensive list:

- *Training and technical assistance**
- Outreach through various methods
- Supporting and educating communities
- Interagency collaboration and coordination
- Coordination with related councils, committees and programs
- *Barrier elimination**
- *Systems design and redesign**
- Coalition development and citizen participation
- Informing policymakers and stakeholders
- Civic engagement
- *Organization competency related to strengthening, building, and expanding existing organizations**
- Resource development for information sharing

Section V: Evaluation

Evaluation is an integral part of the program development and execution. Data collected helps to establish the presence of need and opportunities, improving program, and demonstrates success. In developing the Evaluation Plan, use the templates Logic Model and Evaluation Plan (attached as a PDF, Grants Page) as a guide to create and submit as part of your overall application. Failure to complete and submit an Evaluation Plan will be considered as an incomplete application and shall not be considered for funding.

- a. Create an Evaluation Plan using the template provided that will document the type of activities engaged, the number and types of Outputs and the number and types of Outcomes. Label this document as **Evaluation Plan Template**.
 - i. The ADDPC recognizes the importance of grantees reporting on numbers or Outputs. Outputs are only a reflection of a specific activity being done, for example the number of participants in a specific activity, or the number of flyers created, or the number of trainings conducted. However, each funded applicant shall also be required to report on measurable performance measures or Outcomes, which answers the question – did my program/activity make any difference. Measurable Outcomes shall be created that directly tie back to chosen strategy that will be implemented and shall be tracked for a significant period of time. This will allow the applicant to document the benefits of their program to persons with developmental disabilities and their families.

- b. In a narrative format, describe the following and label this document as **Evaluation Narrative**, with each point clearly identified:
- i. Describe in one page, what you plan to accomplish by the end of a 12 month period and how barriers to accomplishing the Tasks and implementing the Strategies will be addressed.
 - ii. Who will conduct the evaluation for this grant?
 - iii. How often will data (output and outcome) be collected?
 - iv. Who will analyze the information collected?
 - v. Is funding be requested to support evaluation for this project? If so, ensure costs are listed in the budget and explained in the budget narrative.
 - vi. Within 90 days of the contract ending, Contractors shall comply with the AIDD Consumer Satisfaction Survey and submit final responses to the ADDPC at the end of the contract period (see page 18 for AIDD Survey). Provide one or two examples of an evaluation tool that incorporates at a minimum the AIDD Consumer Satisfaction Survey AND output and outcome data to capture that is based on your Evaluation Plan.
- c. Applicants are expected to allocate dollars, if necessary, for staff to attend one-day technical assistance training on evaluation in Phoenix. Costs for any travel expenses shall be listed in the budget and budget narrative, following state travel rules as describe in the Budget Development Guidelines. The ADDPC is working with a contractor with expertise in developing Strategic Plans, Logic Models and Evaluation Plans. The date and location of the training will be finalized 60 days post notification of awards.

**Example of an Evaluation Plan
Based on the Strategy of Training and Technical Assistance**

Goal #1: Build a self-advocacy alliance comprised of diverse advocacy organizations that is led by persons with developmental disabilities.					
Objective	Start/End Date	Output		Outcome	
		Measures	Data Sources	Measures	Data Sources
1.1 Enhance the leadership capacity of self-advocates and increase their involvement in civic and other leadership activities.	10/1/13-9/30/16	Number of sessions (if live instruction) Number of self-advocates enrolled in each session Number who complete the series (if multiple sessions)	Contractor report	ST = Increase in knowledge and skills	Pre/Post
				IT = Number who report using knowledge and skills	Participant survey
				LT = Number who report being engaged in civic and other leadership activities	Participant survey
1.2 Strengthen the capacity of self-advocacy organizations to promote system change.	10/1/13-9/30/16	Number of training sessions, topics covered Amount of technical assistance provided, topics covered Number of organizations served, location (see also 1.3) Number of organizational members engaged in the training and technical assistance, total number of organizational members	Contractor report	ST = Increase in knowledge and skills	Pre/Post
				IT = Number who report using knowledge and skills	Organization
				LT = Number who report increased organization capacity, e.g., 501c3, new funding, new or more effective activities, membership in statewide alliance	Organization survey

Goal #1: Build a self-advocacy alliance comprised of diverse advocacy organizations that is led by persons with developmental disabilities.					
Objective	Start/End Date	Output		Outcome	
		Measures	Data Sources		Measures
1.3 Build capacity for self-advocacy in underserved areas of the state.	10/1/13-9/30/16	Number of training sessions, topics covered Amount of technical assistance provided, topics covered Number of self-advocates involved Location	Contractor report	ST = Number of groups taking action to create a self-advocacy organization, location Number of existing groups reporting efforts to recruit underrepresented groups IT = Number of new self-advocacy organizations, location Number of existing groups reporting increases in number of underrepresented groups among members LT = Increased involvement in self-advocacy change activities such as membership on boards, councils, and alliances that represent the interests of self-advocate individuals with developmental disabilities	Contractor report Organization survey

Performance Measure for Self Advocacy from the Administration on Intellectual/Developmental Disabilities (AIDD)

Output Measurements:

1. Number of people trained in area related to goal/objective
2. Number of people trained in leadership, self-advocacy, and self-determination
3. Number of people trained in systems advocacy

Outcome Measurements:

4. Number of people that show an increase in understanding/knowledge in self-advocacy (short term)
5. Number of people active in systems advocacy (intermediate term)
6. Number of people attained membership on public/private bodies and leadership coalitions (long term)
7. Number of programs or policies created or changed due to membership activity, that enhance self-advocates lives (long term)

Performance Measures for System Change from AIDD

1. Programs/policies created or improved (Outcome Measurement)
2. Number of organizations/coalitions, partnerships involved in systems change (Output Measurement)
3. Number of organizations engaged in systems change efforts (define 'engaged' / Output Measurement)
4. Number of public policymakers educated (define 'educated' / Output Measurement)
5. Number of public members reached (Output Measurement)

**Example of a Logic Model
Based on the Self-Advocacy Objectives**

INPUTS	OBJECTIVES/ACTIVITIES	OUTPUTS <i>Refer to the evaluation plan for measures and targets.</i>	OUTCOMES <i>Refer to the evaluation plan for measures and targets.</i>		
			SHORT	INTERMEDIATE	ULTIMATE
AIDD Funding Partnerships with: • Arizona State University • State Agencies • Community Providers • Advocacy Organizations • Other: Arizona Governor's Councils • Other: Developmental Disability Councils	1.1 Enhance the leadership capacity of self-advocates and increase their involvement in civic and other leadership activities.	Education provided to self-advocates	Self-advocates have increased leadership knowledge and skills	Self-advocates utilize leadership knowledge and skills	Self-advocates are engaged in civic and leadership activities
	1.2 Strengthen the capacity of self-advocacy organizations to promote system change.	Education and support (training/technical assistance) provided to self-advocacy organizations	Self-advocacy organizations have increased organizational knowledge and skills	Self-advocacy organizations utilize knowledge and skills to strengthen their organization	Self-advocacy organizations have increased capacity to promote systems change Self-advocacy organizations join in a statewide alliance
	1.3 Build capacity for self-advocacy in underserved areas of the state. Underserved = No current self-advocacy organization or underrepresented groups in existing organizations	Education and support (training/technical assistance) provided to self-advocates interested in creating a self-advocacy organization	Increased interest in creating a new self-advocacy organization Increased recruitment of underrepresented groups in existing organizations	New self-advocacy groups Increased representation of previously underrepresented groups in existing organizations	Increased involvement in self-advocacy change activities



February 18, 2014

Wendy Dewey, Executive Director
DIRECT Center for Independence
1023 North Tyndall Avenue
Tucson, AZ 85719-4446

AMENDED LETTER of REQUEST

**RE: Proposal in response to RFGA ADDPC-FFY143-SA-00
Self-Advocacy Organizational Support**

Dear Ms. Dewey,

All applications received under RFGA ADDPC-FFY14-SA-00 have been reviewed and yours is being considered to be susceptible to award pending further clarification. Please provide responses in a narrative format, typing each question prior to the response. Final responses shall be emailed no later than 5:00 P.M., Tuesday, February 25, 2014 to mcrane@azdes.gov

1. Clarify the type of data that will be collected during the needs assessment.
 - a. What data has already been collected to date?
 - b. Will data from other stakeholders be used to add to what is being collected by DIRECT?
 - c. How will the data be shared among the stakeholders in this application?
 - d. Will DIRECT do comparisons of the data collected with other community data that has been collected, to determine gaps in identification of needs in the community?
 - e. How/will the data be shared among self-advocates?
2. What is the check and balance that DIRECT will have in place with the local self-advocacy groups to ensure the accountability of the Mini-Grants? For example, how will purchases be made? Who will authorize? How will payment be made to the vendor?
3. For identification and working with local self-advocates, provide details on how modern technology will be used to benefit self-advocacy efforts? For example the role of social media, other technological ways for self-advocates to meet via the web. What role will the Program Coordinator have in building this capacity?
4. Does the Program Coordinator plan on identifying a self-advocate as a community leader to help local advocacy efforts?
5. The application states the Program Coordinator will travel one time to the target communities, and will conduct future meetings by alternative matters. Does the applicant feel the number of face-to-face meetings is adequate? What other strategies and tasks will be done by the applicant to build self-advocacy efforts?

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RFGA ADDPC-FFY14-SA-00
Clarification Letter, Amended

6. Does the applicant have the capacity to continue this project if funding is discontinued after one year? What alternative means will DIRECT put in place if the Program Coordinator leaves the program during the funding cycle?
7. The application states the hire of the Program Coordinator will happen within 6-weeks of notice of award. What types of training does DIRECT have in place to acclimate a new hire so that the responsibilities of the Grant are met in a timely manner?
8. Does the salary for the Project Coordinator commensurate with the job description, experience and expectation for hiring a qualified person?
9. Budget – There is a discrepancy in the project narrative and in the budget regarding the amount of stipend to be offered.
10. Budget - How was Indirect Rate calculated?
11. Budget – The Cash Match of \$8,900 in the budget line item Indirect Rate is approved IF the applicant can provide assurances that Non-Federal Funds are used. Provide source of the Cash Match and assurance that Match is from is from Non-Federal source.
12. Budget – Applicant is short on the required 25% Match. Please use correct calculation as stipulated in the RFGA, Page 19, #4 under MATCH description.
13. Provide revised and signed Budget Summary and Budget Narratives for both requested dollars and match.

The Evaluation Committee will review your responses and will further consider your application. If you have any questions, don't hesitate to contact me at (602) 542-8976 or by email at mcrane@azdes.gov.

Sincerely,

A handwritten signature in blue ink that reads "Marcella Crane".

Marcella Crane
Contracts Manager

ONE Community Working Together



**RE: Proposal in Response to RFGA ADDPC-FFY143-SA-00
Self-Advocacy Organizational Support
Follow Up Questions from ADDPC with Responses**

1. Clarify the type of data that will be collected during the needs assessment.
 - a. What data has already been collected to date? To date, the following data has been collected: Within one day of release, there were 24 responses to the online survey; profiles on the five counties have been completed; 8 interviews were conducted in Pima County and 4 in Graham/Greenlee counties. Complete data collection is in process thus no data compilation is available yet.
 - b. Will data from other stakeholders be used to add to what is being collected by DIRECT? Yes, extensive data from other stakeholder sources are being utilized for DIRECT's Needs Assessment. For example, in Santa Cruz County the data identified and utilized are as follows:
 - i. Holy Cross Hospital Health Needs Assessment (January 2013)
 - ii. Border Conference on Disability Needs Assessment (initial data collection in 2007 with periodic updates)
 - iii. Transportation Needs Assessment for People with Disabilities (BASTIA Project 2011)
 - iv. Santa Cruz Community Foundation (Note: survey open now - data available March 2014)
 - v. SEAGO Needs Assessment Aging Needs (2013) (Note: most data from Cochise)
 - vi. Arizona Border Substance Abuse Needs & Assets Assessment: Santa Cruz County (2012)
 - vii. Statewide needs assessments: AZ Statewide Independent Living Council, DD Planning CouncilThis and other data available in the targeted service area will be added to data collected by DIRECT.
 - c. How will the data be shared among the stakeholders in this application? The needs assessment report will be posted on DIRECT's website, disseminated to stakeholders and emailed to partners/stakeholders and participants wherever possible.
 - d. Will DIRECT do comparisons of the data collected with other community data that has been collected to determine gaps in identification of needs in the community? Data collected will be compared with other community data; however, DIRECT's needs assessment will be focused on people with disabilities in southern Arizona. It is anticipated that DIRECT's data will be more comprehensive and detailed compared to other community and statewide data with regard to the needs of people with disabilities specific to this region.

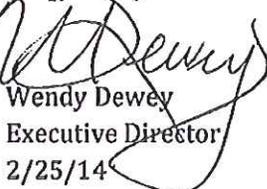
- e. How/will the data be shared among self-advocates? Data will be shared via People First of Tucson and People First of Arizona and through appropriate email lists including national lists. Data will also be presented at appropriate statewide and/or local conferences and directly to self-advocates that DIRECT works with through the proposed program.
2. What is the check and balance that DIRECT will have in place with the local self-advocacy groups to ensure the accountability of the mini-grants? For example, how will purchases be made? Who will authorize? How will payment be made to the vendor? The *Say So of Southern Arizona* Program Coordinator and the mini-grant committee will establish criteria and set guidelines to govern the mini-grants awards including the creating of an application for self-advocacy groups who want to request funds. The application will request information from the applying group regarding what they wish to purchase, how much it costs, cost comparisons, and the expected outcomes. The mini-grant committee, consisting of DIRECT's Executive Director, and Director of Operations will review the applications and recommend or deny each request. If applicable, the committee will request additional information. Once approved, the Executive Director will authorize the award and create a Scope of Work to be signed by DIRECT and the awardee. DIRECT will then purchase the item(s) requested. Funding provided will be tracked by DIRECT's Accountant according to DIRECT's financial policies and procedures. This includes DIRECT making the purchase for the group according to the signed Scope of Work. This is the best way to overcome various barriers to having the groups purchase the item(s) and be reimbursed or be awarded cash and at the same time support the remote areas served. The awardees would come under DIRECT's non-profit status and therefore DIRECT's internal controls and financial policies and procedures will be applied at all times without exception for the authorization, approval, disbursement, and tracking of expenses.
3. For identification and working with local self-advocates, provide details on how modern technology will be used to benefit self-advocacy efforts? For example the role of social media, other technological ways for self-advocates to meet via the web. What role will the Program Coordinator have in building this capacity? DIRECT's years of experience with People First of Tucson and People First of Arizona has found that when modern technology is available, self-advocates have chosen not to use it independently. DIRECT's Self-Determination Coach, who has been an elected advisor for People First of Tucson for over six years, has supported the group in numerous trainings involving modern technology and the group have chosen to use it minimally. Therefore, instead of telling the self-advocacy movement leaders that this is the way they need to successfully connect, the *Say So of Southern Arizona* Program Coordinator will support each group in identifying barriers and problem solving new ways to connect with each other. This will include, if applicable, why the self-advocacy groups have chosen not to use technology, and if this is an area the groups are interested in pursuing. DIRECT will then assist with training and other supports needed to access modern technology, including applying for mini-grants for a computer, for example. The barriers or other reasons groups do not use modern technology and proposed solutions will be shared with ADDPC and other grantees awarded under this RFGA.

4. Does the Program Coordinator plan on identifying a self-advocate as a community leader to help local advocacy efforts? Yes, it is anticipated this will be a natural outgrowth of the relationships developed in DIRECT's service area. Community leaders will be vital to support and guide local advocacy efforts, particularly in rural areas (comprising the majority of the service area).
5. The application states the Program Coordinator will travel one time to the target communities, and will conduct future meetings by alternative matters. Does the applicant feel the number of face-to-face meetings is adequate? What other strategies and tasks will be done by the applicant to build self-advocacy efforts? DIRECT felt the listed travel and one-to-one meetings would be most realistic during year one. However, with the change in focus on the counties that *Say So of Southern Arizona* would serve, the number of face-to-face meetings has been increased to reflect a more concentrated effort in Santa Cruz, Graham, and Pima counties. During the first year, the Program Coordinator will primarily assess what groups are in the service area and conduct outreach to groups and related organizations. The face-to-face meetings will focus on conducting trainings with groups with email and phone contact for follow-up. Once relationships are established, the Program Coordinator will conduct additional face-to-face meetings during subsequent years. Because of the large service area, DIRECT felt this would be the most effective way to reach the maximum number of self-advocates in the targeted area. The Program Coordinator will also build self-advocacy efforts through emails and phone calls.
6. Does the applicant have the capacity to continue this project if funding is discontinued after one year? What alternative means will DIRECT put in place if the Program Coordinator leaves the program during the funding cycle? Should ADDPC funding end, DIRECT would not be able to sustain the proposed program. If the Program Coordinator were to leave during the funding cycle, DIRECT would refill the position as quickly as possible.
7. The application states the hire of the Program Coordinator will happen within 6-weeks of notice of award. What types of training does DIRECT have in place to acclimate a new hire so that the responsibilities of the Grant are met in a timely manner? DIRECT has a New Employee Orientation which includes training specific to Independent Living including self-advocacy. The This is MY Life Program Coordinator will provide additional program-specific and self-advocacy training. The timeline reflects a time period for the Program Coordinator to be trained after hire.
8. Does the salary for the Project Coordinator commensurate with the job description, experience and expectation for hiring a qualified person? Upon further consideration, an increase in salary has been included; please reference the revised budget.
9. Budget - There is a discrepancy in the project narrative and in the budget regarding the amount of stipend to be offered. Total request is \$9,000, maximum for each request is

\$2,500. It is anticipated that requests will vary in amount; therefore an average amount was listed.

10. Budget - How was Indirect Rate calculated? As DIRECT does not have an indirect federal rate, 10% is a standard indirect rate. The amount is based on 10% of the total program amount.
11. Budget - The Cash Match of \$8,900 in the budget line item Indirect Rate is approved IF the applicant can provide assurances that Non-Federal Funds are used. Provide source of the Cash Match and assurance that Match is from Non-Federal source. The cash match is from unrestricted money provided both through a contract with Arizona Bridge to Independent Living in Phoenix and parking fees. Other in-kind matches are as follows: rent is estimated based on comparable costs for space; staff match is provided by the This is My Life Program Coordinator funded by the state of Arizona. The match amounts have been adjusted to reflect adjustments. DIRECT assures that the cash and in-kind matches are from non-federal funding sources.
12. Budget - Applicant is short on the required 25% Match. Please use correct calculation as stipulated in the RFGA, Page 19, #4 under MATCH description. DIRECT apologizes for the error. Adjustments have been made; service area has been revised to include only counties classified as low-income so now a 10% match is required. The match in the budget reflects a 10% match of the total program costs. DIRECT could not make a 25% match and so adjusted the counties to be served, from five to three. Under this revised service area, DIRECT has increased the amount of travel to the three identified counties. The same number of contacts will be made and the same level of service provided in the three-county service area.
13. Provide revised and signed Budget Summary and Budget Narratives for both requested dollars and match. Please see attached revised budget summary and budget narrative to reflect the revised budget. A revised Executive Summary and Methodology and Evaluation are also included.

Respectfully submitted,


Wendy Dewey
Executive Director
2/25/14



B. Executive Summary REVISED

DIRECT Center for Independence's proposed program: **Say So of Southern Arizona – Advocacy in Action**, will improve the effectiveness and sustainability of self-advocacy groups for people with developmental disabilities in Pima, Santa Cruz and Graham counties. *Say So of Southern Arizona* is committed to being led by the self-advocacy group's needs - training, mini grants and capacity building activities undertaken will be guided by self-advocacy groups, not staff or consultants.

Strategies - *Say So of Southern Arizona* will address all three self-advocacy objectives as listed in the ADDPC Scope of Work and will address the following strategies: 1) Training and technical assistance*, 2) Outreach through various methods, 3) Supporting and educating communities, 4) Barrier elimination*, 5) Systems design and redesign*, 6) Coalition development and citizen participation, 7) Civic engagement, 8) Organization competency related to strengthening, building, and expanding existing organizations* and 9) Resource development for information sharing. The majority of the service area includes extremely rural areas that are either unserved or underserved.

Say So of Southern Arizona will use a three step process to accomplish our goal:

- **Step One** During the first four months of funding, DIRECT staff will assess and identify existing self-advocacy groups in our service area. In conjunction with this, the Program Coordinator will assess each group's needs for training and support. In addition, if there are no self-advocacy groups in the area, the Program Coordinator will meet with people with developmental disabilities and encourage and support them in beginning a group.
- **Step Two** Training and mini-grants will be provided to self-advocacy groups who demonstrate need and outline how the requested reward will improve their capacity. Mini-grants will increase their efficiency, sustainability and capacity. Training will be provided by DIRECT staff and expert consultants.
- **Step Three** A regional summit will be held in a central location to provide an opportunity for self-advocacy groups in the service area to network, discuss what's worked and what hasn't, and plan for future alliances. This summit will be an important first step in creating a statewide alliance of self-advocacy groups.

Collaboration Efforts – DIRECT has over 30 years' experience as the Independent Living Center for southern Arizona and as a result has excellent relationships with numerous organizations serving people with disabilities, self-advocacy groups and other community organizations. We will continue to foster and expand our collaborations to ensure maximization of resources and to provide the best service available to participants.

Key Staffing – *Say So of Southern Arizona* will hire a Program Coordinator to conduct outreach, track outputs, coordinate and conduct trainings and provide assistance to self-advocacy groups in the service region. DIRECT staff will provide supervision and administrative oversight. Consultants will provide training and evaluation.

Request – DIRECT Center for Independence is requesting \$81,491.61 to provide the above listed tasks.



C. Methodology & Evaluation REVISED

DIRECT Center for Independence's proposed program: **Say So of Southern Arizona – Advocacy in Action** will improve the effectiveness and sustainability of self-advocacy groups for people with developmental disabilities in Pima, Santa Cruz and Graham counties. The majority of the service area includes extremely rural areas that are either unserved or underserved. This three county service area encompasses a combined total of over 15,000 square miles (an area larger than the entire state of Maryland) and total population of 1,077,113 people.

Say So of Southern Arizona will address all three self-advocacy objectives as listed in the ADDPC Scope of Work including 1) Enhance the leadership capacity of self-advocates and increase their involvement in civic and other leadership activities; 2) Strengthen the capacity of self-advocacy organizations to promote systems change and; 3) Build capacity for self-advocacy in underserved and unserved areas of the state.

Say So of Southern Arizona is committed to being led by the self-advocacy group's needs - trainings, mini grants and capacity building activities undertaken will be guided by self-advocacy group's needs rather than directed by staff or consultants.

Section III. Tasks Each task must be addressed

1. Applicant shall have the knowledge, expertise and capacity to be effective in outreach and work in underserved and un-served areas of the state, both urban and rural.

DIRECT Center for Independence has successfully supported people with disabilities on the path to independence for more than 30 years and was the first agency of its kind in Arizona serving as a non-residential, Independent Living Center operated by and for persons with disabilities. Currently DIRECT annually serves an average of 1,700 people with a variety of disabilities in southern Arizona. As an Independent Living Center, DIRECT is part of the civil rights movement for people with disabilities and operates out of the Independent Living Philosophy. Rather than being an agency that tells what is best for a person, the individual is their own expert. DIRECT's programs help those we serve navigate life's complexities to achieve a better quality of life.

For example, Alice, a joyful young woman with a developmental disability, requested help advocating for more control in her life. Alice said her dream was, "to be independent, to try to make my own decisions, to try to live a normal life without so many of other people's opinions." DIRECT's Self-Determination Coach attended meetings with her and coached her until Alice was able to successfully advocate with her support planning team (including four different case managers) and gain control over her vision for her future. After six months of advocating with support from DIRECT, Alice gained the support of the planning team in preparing for a new job, choosing her own wedding date, and traveling to visit her sister.



DIRECT collaborates with numerous agencies throughout southern Arizona to ensure effectiveness without duplication of services and to improve services available to people with disabilities in the area. DIRECT has built collaborative relationships with the following: People First of Tucson, ARC of Tucson, Pilot Parents of Southern Arizona, Southern Arizona Network for Downs Syndrome (SANDS), Sonoran University Center for Excellence in Developmental Disabilities (UCEDD), Tucson Commission on Disability Issues (CODI), SouthEastern Arizona Governments Organization (SEAGO), Pima Association of Governments (PAG), the State Division of Developmental Disabilities, Camp Wellness, United Way of Southern Arizona, Independent Living Rehabilitation Services (ILRS), University of Arizona College of Architecture, Southern Arizona Aids Foundation (SAAF), Statewide Rehabilitation Council, Vocational Rehabilitation (VR), Rehabilitation Services Administration (RSA), Arizona's Aging and Disability Resource Coalition (ADRC), Pima Community College, Linkages, University of Arizona's Rehab Advisory Council and the Arizona Center for Disability Law.

DIRECT offers a full spectrum of services to encourage, equip and empower people with disabilities to be independent and self-reliant. Programs include; 1) Information and Referral to DIRECT programs and other services in the community available for people with disabilities; 2) Independent Living Skills, providing training in cooking, nutrition, money management, and life skills; 3) Peer Support, encouraging self-responsibility and independence to assist people with disabilities to generate positive changes. Includes *Living Well with a Disability*, Options Counseling, and Peer Mentoring; 4) *This is MY Life*, self-determination and self-advocacy training for people with developmental disabilities to learn how to make decisions, set and achieve goals and increase confidence; 5) Self-Advocacy and Systems Advocacy; 6) Home Access Program, assessment and modifications for the elderly and persons with disabilities with the goal of increasing the safety, accessibility, and independence in the home; 7) Work Incentives Planning and Assistance, in collaboration with Social Security Administration to provide benefits planning, assistance and outreach; 8) Community Based Living, assisting people with disabilities to transition out of nursing homes to independent living and; 9) Access to Independence in Sierra Vista, providing Independent Living Skills in Cochise County to individuals with disabilities. Trainings include (but are not limited to): Money management, social skills, pre-employment skills training, public transportation training, and nutrition and meal preparation.

DIRECT's proposed program, *Say So of Southern Arizona* will serve Pima, Santa Cruz and Graham counties. The majority of these areas are extremely rural and are either unserved or underserved, with the exception of Tucson. DIRECT has numerous contacts in our service area and is currently conducting a needs assessment in these counties which will capture demographic data about people with disabilities, including people with developmental disabilities, in this region. The needs assessment will also gather information on the number of self-advocacy groups in this region and is to be completed by May 2014.



2. Applicant shall have competencies in providing instruction and training including important topic areas such as leadership, organizational design and structure, budget management, and skills in fundraising.

DIRECT has several programs that provide instruction and training for people with disabilities including *This Is MY Life*, which offers self-determination and self-advocacy trainings to adults enrolled in Arizona's Division of Developmental Disabilities. DIRECT's six years of experience working with this curriculum will be used to improve leadership and decision-making competencies to self-advocacy groups in the target area. Additionally, DIRECT has collaborated with Southwest Institute for Families and Children to facilitate SPEAK! trainings with People First of Tucson, has access to national trainings offered by Self-Advocates Becoming Empowered (SABE) regarding starting a self-advocacy group, and owns several training kits purchased from Advocating Change Together. This experience and access to training tools and curriculum means DIRECT staff will be able to offer the level and type of training best suited to meet self-advocacy group's needs.

Additionally, DIRECT will work with consultants from 501 Navigation to provide training on organizational design and nonprofit best practices, fundraising and grant writing, meeting facilitation, creating a budget and strategic plan, marketing, outreach, social media and how to best utilize technology to improve effectiveness. 501 Navigation partners have many years of experience in their areas of expertise and have recently provided training on sustainability for nonprofits at the ASU Lodestar Center annual conference and sustainability and nonprofit best practices for the Community Prevention Coalition, sponsored by the Governor's Office for Children, Youth and Families. Please see the attached Personnel Questionnaire's for additional information about their experience.

3. Applicant shall develop and implement activities that are culturally and linguistically responsive and sensitive.

DIRECT has more than 30 years of experience working with people with all disabilities, including developmental disabilities. DIRECT provides disability etiquette training to other organizations, which includes People First Language, the Ten Commandments of Communicating with People with Disabilities, and other etiquette considerations. DIRECT will utilize its experience and high expectations of cultural appropriateness in our proposed program.

DIRECT serves a diverse population and our staff and board is diverse as well; 30% of DIRECT's consumers, 25% of its Board of Directors, and 50% of its staff consider themselves racial minorities. Over half of the DIRECT team and Board experience disabilities themselves. DIRECT's office and all of its programs provide equal access to all persons with disabilities, regardless of the type of disability, and serves all people of all ages throughout southern Arizona.

Additionally, *This is MY Life*, which offers self-determination and self-advocacy trainings to adults with developmental disabilities, designed its curriculum to be flexible



to respond to different learning styles of program participants, specifically participants who experience learning and cognitive disabilities. Formats include: Role-playing, visual aids such as pictures and PowerPoint presentations, large print, audio and video clips, and reading.

For *Say So of Southern Arizona*, trainings and information sharing will be presented in a way that is flexible to meet the needs of the group. Follow up training and support will be offered after all trainings for anyone who may need additional assistance or have additional questions.

We anticipate that trainings and materials may need to be available in Spanish as well as English, based upon demographics of our service area. DIRECT and 501 Navigation both have access to interpreters to translate materials presented at trainings and have the ability to hold trainings in Spanish if necessary.

4. Applicant shall address transportation barriers with solutions that lead self-advocates to having the desired services, supports and engagement in SA organizations (i.e. attendance at training meetings).

DIRECT has a relationship with SouthEastern Arizona Governments Organization (SEAGO), Pima Association of Governments (PAG) and the Division of Developmental Disabilities. We will collaborate with these organizations to identify existing transportation options available in the service area and, if requested, assist in coordinating transportation for self-advocacy groups to improve their ability to attend meetings.

Based upon the June 2012 report, "*Regional Mobility Management for the SEAGO Region - Graham, Greenlee, Cochise, and Santa Cruz Counties*" there exists a number of transportation options for people with disabilities in these counties. In Pima County there are several public and private transportation options as well.

DIRECT anticipates that many transportation barriers can be addressed with increased education for consumers regarding the options already available. In addition, DIRECT will collaborate with existing carriers to expand options for transportation; for example, if a carrier currently transports elderly passengers DIRECT staff will work with them to expand their service to people with developmental disabilities.

DIRECT will also work with self-advocacy group members to identify other creative solutions to transportation barriers, such as attending meetings remotely or carpooling with family members willing to drive members. If needed, training and resources will be made available to self-advocacy groups to increase their options for attendance of meetings such as purchasing and using phone conferencing equipment and using video conferencing such as Skype.



5. Applicant shall develop or use existing training curriculum in self-advocacy, leadership development, and communication skills within the leadership of self-advocacy groups (such as curriculum supported by the Council).

Curriculum to be used will vary depending on the needs of the self-advocacy groups to be served but we anticipate we will use the *This is MY Life* and SPEAK! Curricula as a basis for trainings with additional materials and presentations added to fit the needs of the group.

6. Applicant shall support peer training, mentoring and leadership development (i.e. serving on other community boards/committees)

Several of DIRECT's programs support peer training and mentoring and we have been very successful in fostering leadership capabilities. More than half of DIRECT's program staff have disabilities and thus are peers and role models themselves. The services they deliver are from a peer support model. Five consumers who have completed *This is MY Life* self-determination and self-advocacy trainings have served as Peer Advocates and supported new consumers in learning how to apply self-advocacy skills to their lives. The Peer Advocates teach classes, are role models, provide insight based on their own experience, and attend DDD's Individual Support Plan meetings as invited by their peers.

Consider George, a person with a developmental disability who joined DIRECT's programs in 2012: "Never give up," became his new motto and helping others became his priority as he learned how to advocate for himself, and dared to dream and plan for his future. Before working with DIRECT, George had given up on people, finances, independence, and speaking up for himself.

A year later, with support and guidance from DIRECT's programs, George was making new friends, fighting for his right to be in control of his finances, moved into his own apartment, and regularly speaking up for himself. He became an example of an empowered self-advocate to other DIRECT consumers, became a volunteer Peer Advocate, and attended a national self-advocacy conference in September 2012. After a year of support from DIRECT, George was motivated to try advocating in areas where he had previously failed. He moved out of his mother's house, made new trustworthy friends, and began to successfully self-advocate with his new communication skills. George continued to grow in self-confidence and develop strong self-advocacy skills. He taught rights and responsibilities to the group and led a photography project, taking and organizing pictures that represent the steps to self-advocacy. As George's motivation increased he began speaking up more about what he wanted. He went from being aggressive to being assertive, speaking up for others as well as encouraging them to speak up for themselves. "My life changed big time," said George.

DIRECT will use our successful models of training and support to encourage and support peer training, mentoring and leadership development in *Say So of Southern Arizona's* efforts.



7. Applicant shall strengthen partnerships with other disability organizations and allies that will ultimately lead to creating a statewide self-advocacy alliance.

As the Independent Living Center for southern Arizona for more than 30 years, DIRECT has fostered numerous partnerships with other disability organizations throughout the state. We work closely with Arizona Bridge to Independent Living (ABIL), Assist! to Independence, New Horizons Disability Employment Center, S.M.I.L.E. - Services Maximizing Independent Living Empowerment, the State Division of Developmental Disabilities, National Council on Independent Living, (NCIL), Arizona's Statewide Independent Living Council (SILC), National Alliance on Mental Illness (NAMI), Southwest Institute for Families and Children, People First of Arizona, Self-Advocacy Coalition of Arizona, Arizona Disability Advocacy Coalition and OASIS self-advocacy group.

In our service area, we support and collaborate with People First of Tucson, ARC of Tucson, Pilot Parents, Southern Arizona Network for Downs Syndrome (SANDS), Arizona Center for Disability Law, Sonoran University Centers for Excellence in Developmental Disabilities (UCEDD) and Tucson Commission on Disability Issues (CODI). There are numerous other organizations and governmental agencies that we work with as part of our Information and Referral program as well.

DIRECT will continue to expand our network and collaborations with other disability organizations and will use these connections to help improve services and lay the ground work for the successful creation of a statewide alliance. We have a long history of successful collaborations with other organizations and are excited to expand our connections to improve the effectiveness of self-advocacy groups statewide.

8. Applicant shall reach out and communicate with other self-advocates that are underrepresented in the self-advocacy movement, and/or that live in underserved or unserved communities.

Most of the proposed area to be included in *Say So of Southern Arizona* is in an underserved or unserved community. The 2013 "*Report on Self-Advocacy in Arizona*" prepared for the Arizona Developmental Disabilities Planning Council by the Institute for Human Development, identified just one self-advocacy group, the Santa Cruz Parent Love Connection, in all of southern Arizona's rural region. Of the groups responding to the survey, 50% were located in Maricopa County, 12.5% in Pima County and 31% in all other regions of Arizona, indicating a lack of self-advocacy group representation in the report from Arizona's rural regions, specifically southern Arizona (6% of total represented in the report).

DIRECT is currently conducting a needs assessment of people with disabilities in Pima, Santa Cruz, Cochise, Graham and Greenlee counties. The needs assessment, to be completed in May 2014, will include information about what self-advocacy groups exist in the service area as well as how many people with developmental disabilities live in these counties.



In addition to information in DIRECT's needs assessment, *Say So of Southern Arizona* will connect with the State Division of Developmental Disabilities, ARC chapters, community centers, and other agencies who serve people with developmental disabilities in the service area to identify self-advocacy groups with low visibility and assess for interest in creating new groups or improving existing groups. Once identified, the *Say So of Southern Arizona's* Program Coordinator will work with existing self-advocacy groups to assess their needs to enable them to be more effective and sustainable. If there is a population of people with developmental disabilities but no self-advocacy group, the Program Coordinator and DIRECT staff will encourage and facilitate the creation of a group.

9. Applicant shall implement evaluation methods to track output and outcome data that supports the self-advocacy objectives, and follow the evaluation templates included as part of the RFGA. Evaluation is the ability to assess organizational and individual member needs that when strengthened lead to improved organizational performance to reflect self-advocacy issues and bring about increased capacity and systems change.

DIRECT will utilize evaluation best practices to track output and outcome data for the objectives to be addressed as follows:

Objective 1: Enhance the leadership capacity of self-advocates and increase their involvement in civic and other leadership activities.

Output data to be tracked during the year one funding period includes number of self-advocacy groups contacted; number of individuals with developmental disabilities contacted; number of self-advocacy groups provided training in leadership and communications and; number of individuals with developmental disabilities provided training and support in leadership and communications. Evaluation will also track the number of goals in this area set by self-advocacy groups, number of self-advocates who were provided technical support in applying for the Pilot Parents Partners in Policymaking training and number of self-advocates in Pima County who were referred for individual self-advocacy trainings.

Outcome data to be tracked during the year one funding period will assess whether people with developmental disabilities who were provided training and support feel better able to: a) communicate their needs, b) lead others in advocacy efforts, c) are aware of how to be involved in civic matters and communicate to their government leaders. Outcomes will also assess whether goals set by self-advocacy groups were met. Longer term outcomes will be assessed in subsequent funding periods.

Objective 2: Strengthen the capacity of self-advocacy organizations to promote systems change.



Output data to be tracked during year one funding period includes number of self-advocacy groups contacted; number of individuals with developmental disabilities contacted; number of self-advocacy groups provided training in systems change, including nonprofit best practices, sustainability, fundraising, budgeting, recruiting members and other topics as identified by the self-advocacy groups; number of individuals with developmental disabilities provided training and support and goals set by self-advocacy groups in this area.

Outcome data to be tracked during year one funding period will assess whether people with developmental disabilities who were provided training and support feel better able to create systems change, including change required to increase their groups' effectiveness and sustainability, whether goals set by self-advocacy groups were met and if any systems change resulted from the groups' efforts. Longer term outcomes will be assessed in subsequent funding periods.

Objective 3: Build capacity for self-advocacy in underserved and unserved areas of the state.

Output data to be tracked during year one funding period includes number of self-advocacy groups that exist in underserved and unserved areas of the proposed service area (entire area with the exception of Tucson); number of individuals with developmental disabilities living in underserved and unserved areas of the proposed service area; existing capacity of self-advocacy groups in the underserved and unserved service area.

Outcome data to be tracked during year one funding period will assess whether self-advocacy groups who were provided training, support and/or mini grants have increased capacity to effect change and; whether people with developmental disabilities not currently involved in a self-advocacy group now have the knowledge and skills to join an existing group nearby or begin a self-advocacy group in their area, and any changes occurring as a result of knowledge and skills gained by self-advocacy groups and members. Longer term outcomes will be assessed in subsequent funding periods.

10. Applicant shall have the ability to organize, facilitate and report on focus groups, public forums and other group activities.

DIRECT has years of experience in organizing, facilitating and reporting on public forums and other group activities. Recently DIRECT has coordinated and facilitated local legislative forums; spearheaded task forces for issues such as hoarding, emergency preparedness and employment (D.R.E.A.M. Team), facilitated internal groups such as the *This is MY Life* Alumni group to elicit feedback on the program and its curriculum, and facilitated Advocates in Action to empower people with developmental disabilities to use their self-advocacy skills at the civic and legislative levels.



As part of this grant request, DIRECT will coordinate a Regional Summit at the end of year one to provide an opportunity for self-advocates in the targeted service area to network, discuss what's worked and what hasn't for their groups, and plan for the future, including involvement with a statewide alliance. DIRECT staff will organize and facilitate the event and assess the success of the event both with surveys and informally through conversations with attendees.

11. Applicant shall have the ability to gather, organize, analyze and record data to make informed choices about self-advocacy activities and involvement in their community.

DIRECT has several federal and state grants that require data capturing, organization, recording and analysis. Our staff are well qualified in data management.

Additionally, the needs assessment will provide detailed data that will inform our activities in the service area to ensure we provide targeted, appropriate training and support to self-advocacy groups. *Say So of Southern Arizona* is committed to being led by the self-advocacy groups and will formulate our training and support to ensure that they meet group member's needs and will support appropriate capacity building for the group.

12. Applicant shall have the ability to manage grant funds per accounting and best practice standards, including the design and implementation of a financial system to award mini-grants in amount of \$5-10K to the identified self-advocacy groups that will enable and assist them in organizational development.

Fiscal records are maintained in accordance with generally accepting accounting practices. DIRECT has a full-time accountant on staff who will assist with managing the grant funds and mini grants for this award.

Say So of Southern Arizona anticipates awarding four to six awards to self-advocacy groups during year one. Awards will average \$2,500 and will be given for items that will increase self-advocacy group's capacity as determined by the groups. Mini-grants will provide, for example, phone conferencing equipment, computers or pay for attendance at state or national self-advocacy trainings (such as the Self Advocates Becoming Empowered [SABE] national self-advocacy conference).

To receive a mini-grant the self-advocacy groups must demonstrate need and outline how the requested award will improve their capacity. Once awarded, DIRECT staff will track the amount of award, who received it and what is requested. The awardee will have to provide receipts to show how the award was spent and will be required to spend the award within the funding period. DIRECT staff will provide support and/or technical assistance to groups to apply, track, and spend money, if required.



13. Applicant shall have the ability to network with other grantees awarded under this RFGA to develop continuity and consistency in moving toward the development of a statewide self-advocacy alliance.

DIRECT has been collaborating with various self-advocacy organizations throughout the state for over a decade, including: People First of Arizona, People First of Tucson, Self-Advocacy Coalition of Arizona, DDD's Self-Determination Advisory Council and Futures Planning Council, Grassroots Advocacy Network, OASIS, and Arizona Disability Advocacy Coalition.

Additionally, DIRECT has numerous connections throughout the state as listed earlier and looks forward to networking with other grantees to take steps toward the development of a statewide self-advocacy alliance.

Section IV: Strategies: The proposed program will address the following strategies:

- *Training and technical assistance**

Say So of Southern Arizona has chosen this strategy as a vital piece to support all three objectives to be addressed in our proposed program. Training and technical assistance offered to self-advocacy groups and people with developmental disabilities in our service area will enhance their leadership capacity, increase their ability to be involved in civic and other leadership activities and strengthen their capacity by providing training in best practices and sustainability for their group. The majority of the area we propose to serve, with the exception of Tucson, is an unserved or underserved area.

- *Outreach through various methods*

We have chosen this strategy to enable us to effectively assess the needs of self-advocacy groups in the targeted service area. Additionally, we anticipate outreach to self-advocacy groups will promote *Say So of Southern Arizona's* trainings and mini-grants, improve relationships, and establish initial steps in creating a cohesive statewide alliance. This strategy will support objectives two and three as outreach to assess need is an important first step in strengthening the capacity of self-advocacy organizations. The majority of the area we propose to serve, with the exception of Tucson, is an unserved or underserved area.

The proposed program will conduct outreach throughout our service region by the following methods: 1) Phone contact with self-advocacy group members; 2) Email or social media contact with self-advocacy group members; 3) Attendance at self-advocacy group meetings and/or; 4) Attendance at related disability organization meetings.

- *Supporting and educating communities*

This strategy was chosen to support all three objectives. As part of *Say So of Southern Arizona's* outreach strategy we will continue to foster relationships in the communities to be served by the proposed program. Relationships with communities in DIRECT'S service area will help create connections to equip,



empower, and encourage self-advocacy group members to have a gateway to leadership and civic involvement. For example, if there are transportation issues, educating organizations who provide transportation can pave the way to resolve issues and improve services as well as provide an entry for self-advocacy groups to approach organizations with their needs.

Additionally, capacity building of self-advocacy groups may be accomplished through improved supports and education in communities. As we learn of organization and individual needs and the services already available, solutions may often be found as we work together. Whenever possible, *Say So of Southern Arizona* will work within existing services to improve capacity, maximize resources and avoid duplication of services.

- *Barrier elimination**

A major focus of all of DIRECT's services is to eliminate barriers. When people with disabilities face barriers they may feel disempowered and unable to effect change. Barrier elimination is a key part of *Say So of Southern Arizona*. This strategy will provide guidance and training to enable self-advocacy group members to clearly identify the barriers they face and problem-solve ways to reduce or eliminate barriers. This process will address all three objectives as we anticipate it will increase members' leadership abilities, identify ways civic involvement can help eliminate barriers, promote systems change as needed to eliminate barriers while targeting many unserved and underserved areas.

- *Systems design and redesign**

This strategy has been chosen to utilize the outreach conducted by *Say So of Southern Arizona* to identify long-term needs in unserved and underserved areas and Tucson. Additionally, the needs assessment currently being conducted by DIRECT will capture the needs of people with disabilities, including people with developmental disabilities, in the service area. This strategy will address objectives two and three.

During year one this strategy will mainly encompass information gathering on needs and initial steps to effect long-term change in areas identified such as transportation, employment and improved services.

- *Coalition development and citizen participation*

This strategy was chosen as part of the *Say So of Southern Arizona's* outreach. If, as part of our outreach, we identify several self-advocacy groups in a small area, the Program Coordinator will encourage and support the creation of coalitions to improve efficiency and effectiveness of the groups.

As part of all these efforts, and as part of the leadership training, citizen participation in all aspects of the community, such as voting, volunteering, attending community meetings and other citizen participation, will be encouraged and supported. This strategy supports objectives one, two and three.



- *Civic engagement*

This strategy was chosen to support objectives one, two and three. Leadership capacity and involvement in civics will be supported through training, ongoing support and information sharing about who to contact about what to effect change in the self-advocacy group's community. Capacity building toward systems change in unserved and underserved areas can be attained in part through civic engagement. For example, to access supports needed to improve self-advocacy groups' capacity, involvement with community groups may be an important first step. An illustration of this may be: the self-advocacy group needs a place to meet and they approach a local community group to advocate for a meeting space.

- *Organization competency related to strengthening, building, and expanding existing organizations**

Say So of Southern Arizona will address this strategy by offering training and mini-grants to self-advocacy groups in our service area and will address objectives one, two and three. Existing self-advocacy groups will be strengthened by offering training and support in areas of identified need such as fundraising, budgeting, member recruitment, communication and strategic planning. In areas with several self-advocacy groups in a small area, coalitions or combining of several groups into one will be encouraged to increase effectiveness and efficiency. In areas where there are people with developmental disabilities without a self-advocacy group, the Program Coordinator will discuss the advantages and steps to beginning a group and encourage and facilitate this process.

- *Resource development for information sharing*

This strategy was chosen to address objectives two and three. Resources will be developed both through the DIRECT needs assessment currently being conducted and through information gathered through outreach efforts. These resources will be shared with self-advocacy groups in the service area to improve their capacity via connecting the members' with existing services and to other self-advocacy groups.

Resources and information will also be shared with other organizations serving people with disabilities in the service area to enable them to be better informed of demographics and needs of the population. Additionally, information will be shared with ADDPC to assist in the creation of a statewide alliance of self-advocacy groups.

Section V: Evaluation

a. Evaluation Plan Template

Goal: To Improve the Effectiveness and Sustainability of Self-Advocacy Groups for People with Developmental Disabilities in Pima, Santa Cruz and Graham counties

Objective	Start/End Date	Output		Outcomes	
		Measures	Data Sources	Measures	Data Sources
1. Enhance the leadership capacity of self-advocates and increase their involvement in civic and other leadership activities	All of year one	Number of self-advocacy groups contacted; number of individuals with developmental disabilities contacted; number of self-advocacy groups and individuals provided training, number provided one to one support, number of goals set by self-advocacy groups. In Pima County number of self-advocates participating with Pilot Parents Partners in Policymaking	Monthly reports created by Program Coordinator	Short Term (ST), Intermediate Term (IT), Long Term (LT)	
				Measures	
				ST – Increase in knowledge and skills	Participant survey
2. Strengthen the capacity of self-advocacy organizations to promote systems change	All of year one	Number of self-advocacy groups contacted; number of individuals with developmental disabilities contacted; number of self-advocacy groups, individuals provided training and support in systems change and number of goals set by self-advocacy groups	Monthly reports created by Program Coordinator	Measures	
				IT – Participants utilize new skills	Participant survey and follow up survey given during next funding period
				LT – Increased organization capacity	Follow up survey given during next funding period



b. Evaluation Narrative

- I. Describe in one page, what you plan to accomplish by the end of a 12 month period and how barriers to accomplishing the Tasks and implementing the Strategies will be addressed.

Phase One: During the first four months of funding DIRECT staff will assess and identify existing self-advocacy groups in DIRECT'S service area, in part by reviewing the needs assessment and in part by conducting outreach to communities in the region. The self-advocacy groups that are currently in existence will be assessed for their needs to increase their capacity and sustainability through training and support. In addition, if there are no self-advocacy groups in the area, the Program Coordinator will meet with people with developmental disabilities and encourage and support them in beginning a group.

Anticipated barriers and solutions are: 1) Difficulty in accurately capturing the number of people with developmental disabilities and self-advocacy groups in the service area due to the extreme rural areas in much of the region. This will be addressed through cross examining existing data, such as from DDD, with needs assessment findings, and through relationship building with service providers in the target area. 2) Reluctance of people with developmental disabilities to begin a self-advocacy group or join an existing group. This will be addressed through encouragement and support by DIRECT staff and self-advocacy group members. Additionally, individual self-advocacy training will be offered to DDD consumers in Pima County through DIRECT's *This is MY Life* trainings. 3) Difficulty in attending meetings due to transportation issues. This will be addressed by problem-solving ideas with group members, working with local transportation providers and encouraging and facilitating group members to advocate for systems changes if necessary to increase transportation options.

Phase Two: During month five through year end, training and mini-grants will be provided to self-advocacy groups as requested to increase their efficiency and sustainability. Training will be provided by DIRECT staff and expert consultants. A process to review, assess, award and track mini-grants will be created.

Anticipated barriers and solutions are: 1) Varying learning speed and styles of participants. This will be addressed by offering follow-up support after every training to address questions and offer reminders of what was learned. Additionally, DIRECT's *This is MY Life* Self-Determination Coach will be available as a mentor and consultant to offer her extensive experience in providing training to individuals with a variety of learning styles. 2) Trainings and mini-grants are not effective to increase capacity of self-advocacy groups. This will be addressed by conducting outreach to self-advocacy groups to assess their needs and plan trainings to address identified areas of focus. Mini-grants will be awarded to provide for the most pressing needs that will be most effective in improving capacity. 3) Difficulty in spending down mini-grants or in utilizing equipment

Objective	Start/End Date	Output		Outcomes	
		Measures	Data Sources	Short Term (ST), Intermediate Term (IT), Long Term (LT) Measures	Data Sources
3. Build capacity for self-advocacy in underserved and unserved areas of the state	All of year one	Number of self-advocacy groups that exist in underserved and unserved areas of the service area (entire area with the exception of Tucson); number of individuals with developmental disabilities living in underserved and unserved areas of the proposed service area; existing capacity of self-advocacy groups in the underserved and unserved service area	Needs assessment and monthly reports created by Program Coordinator	ST – Increase in knowledge of how to build capacity	Participant survey, Program Coordinator
				IT – Increased number using knowledge to build capacity	Follow up survey given during next funding period and Program Coordinator
				LT – Capacity improved such as fundraising, 501 (c) (3) status, increased membership	Follow up survey given during next funding period and Program Coordinator

Please note: Our evaluator will assist in developing surveys, compiling data and analyzing to capture outcomes.



purchased. This will be addressed by careful consideration of requests and offering follow-up and support to ensure purchases are being utilized.

Phase Three: At the end of year one, a regional summit will be held in a central location to provide an opportunity for self-advocacy groups in the service area to network, discuss what's worked and what hasn't, and plan for future alliances. The goal will be to energize and empower self-advocates and offer opportunities for them see the advantages of unity. This summit will be an important first step in creating a statewide alliance of self-advocacy groups. Anticipated barriers and solutions are: 1) Difficulty in obtaining transportation to the summit. To be addressed by working with self-advocacy groups to create solutions, including carpooling, working with local transportation providers, or renting large vehicles to transport attendees. 2) Lack of effectiveness of the summit in promoting unity and change. To be addressed through careful planning of summit location, topics and format. Efforts will be led by self-advocacy groups with clear expectations and end results of the summit to be outlined. Future steps and follow-up will be clearly communicated to all attendees.

ii. Who will conduct the evaluation for this grant?

An outside evaluator, Leslie Cohen of Sonoran University of Excellence in Developmental Disabilities (UCEDD) will conduct evaluation including designing surveys, assisting in data collection if needed and analyzing output and outcome data.

iii. How often will data (output and outcome) be collected?

Output data will be collected ongoing during year one and recorded monthly. The Program Coordinator of *Say So of Southern Arizona* will track each contact with self-advocacy groups and individual people with developmental disabilities during the funding period, as well as the number of self-advocacy groups and individuals with developmental disabilities throughout the service area. We anticipate offering six trainings and the number attending will be captured at each training. The number of members receiving follow-up support will also be tracked ongoing.

Outcome data will be captured and recorded on monthly reports as applicable after each training and at the regional summit via surveys, to include the AIDD Consumer Satisfaction Survey questions.

iv. Who will analyze the information collected?

Primarily the evaluator, Leslie Cohen of Sonoran University of Excellence in Developmental Disabilities (UCEDD). Information collected will be reviewed and analyzed by *Say So of Southern Arizona* Program Coordinator and DIRECT's Director of Operations as well.

v. Is funding to be requested to support evaluation for this project? If so, ensure costs are listed in the budget and explained in the budget narrative.

Yes, funding is requested for evaluation, please see costs in budget and budget narrative.

v.i. Within 90 days of the contract ending, Contractors shall comply with the AIDD Consumer Satisfaction Survey and submit final responses to the ADDPC at the end of the contract period (see page 18 for AIDD Survey). Provide one or two examples of an evaluation tool that incorporates at a minimum the AIDD Consumer Satisfaction Survey AND output and outcome data to capture that is based on your Evaluation Plan.

DIRECT will comply with ADDPC request for survey responses. Our evaluator will compile a final report of AIDD survey responses and surveys designed to capture outcome data from trainings and other activities.

**Example of Evaluation Tool for *Say So of Southern Arizona*
(not inclusive or finalized)**

AIDD survey sections -

- a. Respect: I (or my family member) was treated with respect during the project activity. Yes or No
- b. Choice: I (or my family member) have more choice and control as a result of project activity. Yes or No
- c. Community: I (or my family member) can do more things in my community as a result of project activity. Yes or No
- d. Satisfied: I am satisfied with project activity.
Strongly Agree I Agree I Disagree I Strongly Disagree
- e. Better Life: My life is better because of project activity.
Strongly Agree I Agree I Disagree I Strongly Disagree
- f. Rights: Because of this project activity, I (or my family member) know my rights. Yes or No
- g. Safe: I (or my family member) are more able to be safe and protect myself from harm as a result of activity. Yes or No

Outcomes –

- h. As a result of this training, I am better able to communicate my needs. Yes or No
- i. As a result of this training, I know how to contact civic leaders. Yes or No
- j. As a result of this training, my self-advocacy group knows how to increase our capacity.
Strongly Agree I Agree I Disagree I Strongly Disagree

Please note: Outputs will be captured via sign in sheets and from data captured by the *Say So of Southern Arizona* Program Coordinator

REVISED Budget Narrative for DIRECT Center for Independence

Proposed Program: Say So of Southern Arizona - Advocacy In Action

Year One

Personnel

Program Coordinator (to be hired) 1 FTE, 100% of time spent on this program, coordinating trainings for self-advocacy groups, coalescing information gathered, contacting self-advocacy group members, assisting in facilitating meetings if required, assisting in obtaining transportation for members if required, assist in identifying what groups would benefit from a mini-grant, assist with problem-solving and day-to-day support as needed for self-advocacy groups, including information and referral to other services

Salary \$35,000, average starting salary for this type of position, not expected to increase during year one

Shannon Bergman, *This is MY Life* Self-Determination Coach .10 FTE, 10% of time spent on this program, providing in-house consulting and mentoring to Program Coordinator in program implementation

Salary \$3,400 (10%) not expected increase in year one. This salary will be used as part of the match requirement

Marti Vendor, Director of Operations, .05 FTE, 5% of time spent on this program, supervisor of Program Coordinator, assist in program oversight

Salary \$2,000 (5%), not expected increase in year one.

Ganga Samarasinha, Accountant, .05 FTE, 5% of time spent on this program, assisting with fiscal oversight, including mini grants, tracking expenses and maintaining accurate records for reporting

Salary \$2,184 (5%), not expected increase in year one.

Wendy Dewey, Executive Director, .02 FTE, 2% of time spent on this program, general program oversight

Salary \$1,200 (2%), not expected increase in year one.

Total personnel (ask) \$40,384

Personnel costs to match \$3,400 (source state funding)

Fringe Benefits

Employer paid benefits include health, dental Short Term/Long Term disability insurance and worker's compensation. Approximately 61% of total are benefits, 37% is payroll taxes and 2% is 401K employer match.

Fringe benefit total is averaged at 27% of salary.

ERE expenses (ask) \$10,904

ERE expenses match \$918

Supplies/Operating Expenses

For new employee: Laptop \$1,000

For the proposed program: Material duplication of curriculum and information for self-advocacy groups we will work with, estimate cost at .5 cents a page, estimate 2500 copies (or 50 pages for each attendee, estimate 50 attendees). Total cost \$125

For Regional Summit: Estimated costs for space \$900, food (breakfast and lunch) estimated cost \$15 per person, \$750 (estimate 50 attendees), transportation (van rental) \$500, to ensure people are able to attend. Total costs \$2,150

For the proposed program: Mini grants as requested by self-advocacy groups, we estimate we will award 4 grants in year one, average \$2,250 for each grant, total mini grants for year one \$9,000

Total supplies (ask) \$12,275

Travel

Costs for Program Coordinator to travel to attend self-advocacy meetings and meet with self-advocacy members in the target area of Pima, Santa Cruz and Graham counties, estimates as follows:

In Pima County

Travel in Tucson estimated at 20 miles a month, attend one meeting each month plus additional one to one meetings, 240 miles a year X 44.5 cents a mile per state of Arizona travel policy, total \$106.80

Travel to rural areas of the county including Sahuarita (47 miles round trip) and Vail (48 miles round trip), total miles 95 X 44.5 cents a mile, total \$42.28. Estimate one trip to each location during year one.

Per diem for 2 lunch meals estimated for rural trips, total for Pima County \$20 (\$10 each meal per state of Arizona default rate). We don't anticipate overnight travel for these locations.

Total travel costs in Pima County \$169.08

In Santa Cruz County

Travel to Nogales (138 miles round trip), total miles 138 X 44.5 cents a mile, total \$61.41, total \$184.23; estimate three trips during year one with follow up via telephone and email as required.

Per diem estimated at 2 meals each trip or \$20 (per state of Arizona default rate), total per diem \$60.

Total travel costs in Santa Cruz County \$244.23

In Graham County

Travel to Safford (254 miles round trip) anticipate two trips during year one with follow up via telephone and email as required. Mileage X 44.5 cents a mile, \$113.03 each trip, \$226.06 total. Per diem estimated \$34 per default rate, total \$68, overnight stay cost \$60 per default rate; total is \$120.

Total travel costs in Graham County \$414.06

Travel for staff to attend training in Phoenix

If awarded, the Program Coordinator and Director of Operations will travel to Phoenix for ADDPC training on evaluation. Estimated mileage at 232, X 44.5 cents a mile, \$103.24. Per diem estimate 2 meals, \$54 per Maricopa rate, total \$108. Lodging estimated at \$109 each for one night, total \$218.

Total for Phoenix training \$429.24

Total travel (ask) \$1,256.61

Rent or Cost of Space

Cost of space for DIRECT offices, **\$2,007** (3% of total cost of \$66,912). This will be used as an **in-kind match**.

Contracted Services/Professional Services

Training - DIRECT anticipates hiring consultants from 501 Navigation to conduct trainings for self-advocacy groups. Costs are estimated as follows:

Conduct trainings in 501 Navigation areas of expertise for self-advocacy groups in the target area. Final training topics to be identified by the self-advocacy groups but are anticipated to include fundraising, grant writing, marketing, communication and sustainability. Anticipate conducting 6 trainings in year one with three trainings in Tucson in Pima County, two in Santa Cruz County and one in Safford in Graham County. Each training is estimated at two hours with four hours for preparation at \$85 an hour or \$500 for each training plus mileage estimated at \$15 for each Tucson training, \$55 for each Santa Cruz County and \$109 for Safford or \$264.00 for mileage. Total estimate for consultants to conduct training \$3,264.00

Program Evaluation – conduct evaluation during year one including creating surveys and evaluating results, \$5,000

Translation services – Estimated costs to translate program materials into Spanish, \$1,000

Total Professional Services \$9,264

Administrative/Indirect Costs

DIRECT does not have a federally approved indirect rate, therefore we request 10% of the request total for administrative expenses, or \$7,408

Match Required \$9,055

In-kind match \$4,318 (Shannon Bergman's salary and ERE) plus \$2,007 for rent costs total \$6,325 in-kind match

Remainder \$2,730 provided in cash match via parking fees and ABIL contract fees

REVISED BUDGET SUMMARY
APPLICATION NO. ADDPC-FFY14-SA-00

Budget Request Form

Contractor Name: DIRECT Center for Independence

Contractor Address: 1023 N. Tyndall Ave. Tucson AZ 85719
Street Address City State Zip

Project Name: Say So of Southern Arizona - Advocacy in Action

Budget Category	Requested ADDPC Funds	Non-Federal Cash Match	Non-Federal In-Kind Match	Total Program Cost
Personnel/Salaries	\$40,384.00		\$3,400.00	\$43,784.00 -
Fringe Benefits	\$ 10,904.00		\$ 918.00	\$11,822.00 -
Supplies / Operating Expenses	\$ 12,275.00			\$12,275.00 -
Travel	\$ 1,256.61			\$ 1,256.61 -
Rent or Cost of Space	---		\$2,007.00	\$ 2,007.00 -
Contracted Services / Professional Services	\$ 9,264.00			\$ 9,264.00 -
Administrative / Indirect Costs	\$ 7,408.00	\$2,730.00		\$10,138.00 -
Total Costs	\$81,491.61 -	\$2,730.00 -	\$6,325.00 -	\$90,546.61 -

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.

Wendy Dewey

Name of Certifying Official

Executive Director

Title of Certifying Official

520-561-8780

wendyd@directilc.org

Phone

Email