

## SA Coalition Clarifications

Due Friday, August 21, 2020

### **What are the lessons learned in previous self-advocacy coalition building that SWI has learned that will inform you on how to proceed differently?**

SWI has experience in developing and strengthening self advocacy groups through its previously funded project known as Supporting People through Empowerment, Advocacy, and Knowledge (SPEAK). In the project, SWI worked with self advocacy groups by helping them develop their mission statements, strategic plans, as well as outreach efforts to develop their groups. While the project was successful in establishing self advocacy groups, ultimately the groups never came together to develop a unifying self advocacy voice. The efforts of the groups never took on any large issues other than that of personal self advocacy within the group members.

Furthermore, through the Southwest Alliance Technical Assistance Center (SWATAC) Grant, SWI was able to work with existing self advocacy groups in 6 different states to develop state plans and strategic plans to strengthen self advocacy groups and develop working relationships within their DD Networks. However, the grant did not address the development of new self advocacy groups.

The purpose of this grant is to establish new self advocacy groups or strengthen existing groups with the purpose of developing a statewide coalition. SWI will use its experience from the SPEAK Grant to work with organizations willing to support the establishment strengthening of self advocacy groups. SWI will also use its experience under the SWATAC Grant to bring together self advocacy groups to develop a cohesive strategy around self advocacy.

### **How will providing mini-grants lead to sustainability and capacity building?**

Starting or strengthening a self advocacy group is not easy to do. It requires hard work to organize like-minded individuals to work together for a common cause. Things such as recruitment, advertising, sharing information, travel all are part of developing a group that often times incurs cost and can be cost prohibitive to many people. The purpose of the mini grant is to provide the seed money necessary to start groups and build capacity. Providing \$2000 will not sustain a group for years to come. However, the money will be used to make those first initial expenses that will help firmly establish the group and lead it towards a path of sustainability.

**3. Clarify the number of self-advocacy groups that will be participating? Will SWI conduct any outreach to existing self-advocacy groups in Northern Arizona or in other areas outside of Maricopa County? If so, who are those groups?**

SWI and its partners plan to work with five self advocacy groups throughout the state of Arizona. Our goal is to work with self advocacy groups that represent Arizonans throughout the state and not just in the major metropolitan areas. To do so, SWI will be doing outreach to self advocacy groups and organizations in both northern and southern Arizona. During the first year, SWI and its partners will reach out to organizations such as the Native American Disability Law Center, DIRECT, New Horizon, as well as other organizations identified by our grant partners and advisory committee.

**What is the amount of mini-grants that will be funded? What is your internal fiscal and oversight process to ensure the mini grants are tracked, the requested amount is appropriate, and what documentation will be required to review before payment is made? Who will have responsibility for this?**

The goal of the grant is to provide mini grants to five self advocacy groups worth up to \$2000 each grant for a total of \$10,000. This is a revised total down from \$20,000 as we have had to make changes to our budget. SWI will oversee the mini grant portion of the program. George Garcia and Juliana Huereña will work with each self advocacy group and their fiscal agents to make sure each group meets the necessary requirements to receive funding. SWI bookkeeper, Priscilla Perkins will track funds and make payouts as directed by George Garcia.

The mini grant program will be divided into two different sections. The first \$500 of the mini grants will be based on work completed by each self advocacy group. In order to receive the \$500, the self advocacy group will have to submit a written mission statement and a one-year strategic plan that includes measurable goals and objectives. The purpose of this section is to ensure that the self advocacy group has the beginning formation of a group and a plan as to what they want to do with the group. The work of the self advocacy group will be reviewed by SWI and approved before payment is processed.

The second section of the mini grant program will be based on reimbursable expenses. Each self advocacy group will be provided with a list of possible expenses that may be eligible for reimbursement. Examples of reimbursable expenses include printing cost for self advocacy brochures and flyers, self advocacy swag, travel expenses to and from meetings or conferences for self advocates. Each self advocacy group will be encouraged to discuss future expenses with SWI to ensure that such expense will qualify for reimbursement. In order to apply for reimbursement, each group will be required to provide proof of expenses such as invoices, receipts, and mileage for any travel. The submitted paperwork will be reviewed by SWI and all payments will be processed by SWI bookkeeper, Priscilla Perkins.

**Describe the role of the Sonoran UCEDD and NAU/IHD with this project. Provide a letter of support from each UCEDD (on letterhead) that describes their role and activities.**

SWI, and its partner The Arc of Arizona, will establish an executive committee consisting of staff from SWI, The Arc of Arizona, as well as Teresa Moore, and members from both UCEDDS. NAU/IHD and the Sonoran UCEDD will play an important role in the

implementation of the project. As UCEDD's, both organizations have a keen understanding of the issues and barriers faced by people with Intellectual and Developmental Disabilities (I/DD) in Arizona.

**Describe Therese Moore's role with this project. What activities will she be responsible for?**

Teresa Moore will play a vital role in the development of a statewide self advocacy coalition. With years of experience working with self advocacy groups on a state and national level, Teresa brings to the table a wealth of knowledge regarding the development and strengthening of self advocacy groups. To help develop a statewide self advocacy coalition in Arizona, Teresa Moore will be part of the grant executive committee. Consisting of members from SWI, The Arc of Arizona, The Sonoran UCEDD, and The Institute on Human Development, the executive committee will develop the programs and strategies to implement the grants goals and objectives. Her experience in working with self advocacy groups as well as her prior experience in developing Arizona's original self advocacy coalition will help guide the project toward successful strategies while helping us avoid mistakes encountered during the development of the first self advocacy coalition.

Teresa Moore will also be part of the statewide self advocacy coalition known as Self Advocacy Solutions. The new statewide self advocacy coalition will bring together current and newly developed self advocacy groups in an effort to develop a more unified voice for self advocates in Arizona. Teresa Moore's experience in developing Arizona's original statewide self advocacy coalition will help guide the coalition in using its voice to advocate on behalf of people with disabilities on a variety of issues that affect people statewide.

Finally, Teresa Moore will work directly with SWI to help identify and recruit self advocacy groups throughout Arizona. Her past experience in developing Arizona's statewide self advocacy coalition will help guide us in bringing together self advocacy groups and those who wish to start self advocacy groups throughout Arizona.

**Who will have oversight of the proposed conference expenditures (\$19,950 requested)?**

The Arc of Arizona will oversee the conference expenditures. SWI will reimburse The Arc of Arizona for any expenses incurred in putting together the conference. To apply for reimbursement, The Arc of Arizona will provide SWI with an invoice and proof of expenses such as invoices and receipts to qualify for reimbursement.

## **Budget info**

**How was the amount under the Travel budget line item arrived at? Provide justification for costs, utilize State of AZ travel for appropriate costs.**

Please see attached budget narrative. All travel cost was calculated using Arizona's approved mileage and per diem.

**Any revenue received due to Conference Sponsorship registration fees and vendor table fees are considered Program Income. These expected funds cannot be used as Match. Please remove from the budget summary and narrative and determine other sources of match.**

Please see attached budget narrative.

**Address how SWI recruits new board members and the length of time board members serve. Does SWI have an internal policy to address board members?**

SWI policy for board membership is set forth in its bylaws. Recruitment and approval of board membership is done by the board members. Each board member serves for one year and is up for reelection. There is no limit to the number of times board members can apply for board membership.

**All budget changes will require a re-submission of the Budget Summary Form and Budget Narrative for requested dollars and for match.**

Please see attached budget summary form and budget narrative.

**Self Advocacy Coalition Budget Form 2020-2021**

| <b>Budget Category</b>                       | <b>Requested ADDPC Funds</b> | <b>Non-Federal Cash Match</b> | <b>Non-Federal In-Kind Match</b> | <b>Total Program Cost</b> |
|--|------------------------------|-------------------------------|----------------------------------|---------------------------|
| Personnel/Salaries                           | 22,000                       |                               | 9,500                            | 31,500                    |
| Fringe Benefits                              | 3,003                        |                               | 1,296.71                         | 4,299.71                  |
| Supplies / Operating Expenses                | 0                            |                               | 2,000                            | 2,000                     |
| Travel                                       | 9,108.16                     |                               | 0                                | 9,108.16                  |
| Rent or Cost of Space                        | 0                            |                               | 0                                | 0                         |
| Contracted Services<br>Professional Services | 49,950                       |                               | 15,081                           | 65,031                    |
| Administrative /Indirect Costs               | 0                            |                               | 1,042.68                         | 1,042.68                  |
| <b>TOTAL</b>                                 | <b>84,061.16</b>             |                               | <b>28,920.39</b>                 | <b>112,981.55</b>         |

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.

George Garcia  
Name of certifying Official

Executive Director  
Title of Certifying Official

602-235-0354 extension 801                      G.Garcia@SWIfamilies.org  
Phone    Email

## Self Advocacy Coalition Budget Narrative 2020-2021

### Personnel \$31,500

#### **George Garcia \$8,800 with an additional \$2,100 in-kind = \$10,900**

Project Director, George Garcia, MSW 0.22 FTE (\$10,900) salary for one year x \$50,000/annual wage to serve as the senior administrator, provide programmatic oversight, develop, implement, and evaluate self advocacy coalition committee, self advocacy groups and self advocacy conference.

#### **Juliana Huereña \$8,800 with an additional \$2,100 in-kind = \$10,900**

Operation manager to project- Juliana Huereña, MT-BC, .24 FTE (\$10,900) salary for one year x \$45,000. Participate with Garcia to develop, implement, and evaluate self advocacy coalition committee, self advocacy groups and self advocacy conference.

#### **Bill Lucero \$4,400**

Program aide, Bill will provide technical assistance in program implementation and graphic design.

#### **Priscilla Perkins \$5,300 in kind**

Priscilla Perkins will provide bookkeeping and financial support for the project, 0.11 (\$5,300) X \$50,000/annual wage to maintain the financials and HR for the project.

#### **Fringe Benefits \$4,299.71**

Employee Related Expenses -SWI has a formula that yields the following: 13.65% which includes FICA 6.2%, Medicare 1.45%, and FUTA 6%.

**George Garcia \$8,800 X 13.65% = \$1,201.20**

**In kind \$2,100 X 13.65% = \$286.63**

**Juliana Huereña \$8,800 X 13.65% = \$1,201.20**

**In kind \$2,100 X 13.65% = \$286.63**

**Bill Lucero \$4,400 X 13.65% = \$600.60**

**In kind Pris Perkins \$5,300 X 13.65% = \$723.45**

#### **Operating/Supplies Expenses \$2,000 In-kind**

**In kind \$2,000** will be collected from sponsors for self advocacy conference swag

#### **Travel \$9,108.16**

SWI admin will travel around the state to work with self advocacy groups \$4,058 for travel.

#### **Flagstaff 2 visits \$650.40**

Hotel: \$0

Ground transportation: 280 miles round trip X 2 cars X 2 roundtrips X 44.5 = \$498.40

Per diem: \$19 X 4 people x 2 visits = \$152  
TOTAL = \$650.40

**Kayenta 2 visits \$1,548.20**

Hotel: 2 rooms X 1 night X \$131 = \$292 X 2 visits = \$584  
Ground transportation: 580 miles round trip X 2 cars X 2 round trips X 0.445 = \$516.20  
Per diem: \$56 X 4 people = \$224 X 2 visits \$448  
TOTAL = \$1,548.20

**Tucson 2 visits \$572.08**

Hotel: \$0  
Ground transportation: \$236 round trip X 2 cars X 2 round trips X 0.445 = \$420.08  
Per diem: \$19 X 4 people X 2 visits = \$152  
TOTAL = \$572.08

**Nogales 2 visits \$1,287.48**

Hotel: \$94 X 2 rooms X 1 night X 2 visits = \$376  
Ground transportation: 366 miles round trip X 2 cars X 2 round trips X 0.445 = \$651.48  
Per diem: \$45 X 4 people X 2 trips = \$260  
TOTAL = \$1,287.48

**State conference travel**

25 Conference travel vouchers for self advocates who will travel over 100 miles one-way, 25(\$56 for meals + \$146 for lodging) = \$5,050

**Rent or cost of space \$0**

**Contracted Services / Professional Services \$65,031**

**\$20,000 The Arc of Arizona**, conference organizer, to manage conference logistics.  
**In kind** The Arc of Arizona will provide in kind total of \$3,981.  
Kristi Short \$825 (25 hrs X \$33 for Admin support) and Jon Meyers \$3,156 for 55 hrs

**Mini grants**

**\$10,000** to distribute \$2,000 mini grants to 5 self advocacy groups.  
(5 groups X \$2,000 = \$10,000).

**Self Advocacy Conference**

**\$19,950** will be used for Conference expenses that include the venue, food, AV equipment rental, printing and accessible accommodations.

**In kind \$1,200** will be from conference volunteers. (10 people X \$15 X 8 hrs).

**In kind** support from both **SONORAN and IHD/NAU UCEDDs** in the amount of **\$3,900**.

**In kind** 1 person from **SONORAN** (30 hrs X \$50 = \$1,500)

**In kind** 1 person from **IHD/NAU** (48 hr X \$50 = \$2,400)

**In kind Teresa Moore for Moore Advocacy Consulting** will provide in kind consulting services on self advocacy coalition development and recruitment for the amount of **\$6,000** (10 hrs/month X \$50)

**Administrative /Indirect Costs \$1,042.68**  
**In Kind \$1,042.68**



August 18, 2020

Arizona Developmental Disabilities Planning Council  
Attn: Grants Review Committee  
3839 N. 3<sup>rd</sup> Street, Suite 306  
Phoenix, AZ 85012

**RE: RFGA FFY20-SACD-A1 – Self-Advocacy Coalition Building in Arizona Communities**

Dear Committee Members:

As the Executive Director of the Institute for Human Development (IHD) at Northern Arizona University, I am pleased to support the application for funding submitted by Southwest Institute for Families and Children (SWI) and The Arc of Arizona (The Arc) related to the 2020 Self-Advocacy Coalition Building grant opportunity.

IHD's vision is that *people with disabilities fully participate in all life experiences*. Our mission statement, aligned with this vision, calls upon IHD to promote full inclusion by advancing attitudes that value persons with disabilities and enhancing access to all aspects of the human experience. IHD leadership, faculty and staff strive to foster the development of attitudes that promote the public's appreciation and value of individuals with disabilities. Attitudes, as barriers to or facilitators of inclusion, go hand-in-hand with access. Access, commonly thought of as access to services and supports, has a much broader meaning. Services are unquestionably essential for inclusion but access also refers to access to information, education, physical environments, community, friendships, relationships, etc. Conceptually, access and attitude have reciprocal roles in promoting or inhibiting inclusion. The proposed project clearly aligns with the mission and vision of IHD and understands the complex roles that access and attitude play in the promotion of true inclusion.

Although great progress has been made towards these vital goals, we recognize much more must be done to build strong state and national networks of self-advocates. We are confident the coalition-building project proposed by SWI and The Arc will achieve meaningful results in Arizona. With the applicants collective expertise in serving individuals with disabilities through training, public policy, and community outreach, as well as the applicants' experience in self-advocacy, these partners—individually and through their organizational networks—are ideally positioned to make a significant contribution to the development of a true statewide self-advocacy coalition. IHD is committed to working with SWI and The Arc on this effort through an in-kind donation of staff support, estimated at approximately four hours monthly, of our staff expertise and experience, to ensure optimal outcomes and meaningful growth in Arizona's self-advocacy community.

Overall, I am pleased to offer this letter of recommendation on behalf of IHD, and I wholeheartedly endorse the combined request by Southwest Institute for Families and Children and The Arc of Arizona. Should you have any questions, please feel free to contact me at [Kelly.roberts@nau.edu](mailto:Kelly.roberts@nau.edu) or (808) 255-2101.

Sincerely,

A handwritten signature in black ink, appearing to read 'Kelly D. Roberts', with a long horizontal flourish extending to the right.

Kelly D. Roberts  
Executive Director and Professor

Sonoran University Center of Excellence  
In Developmental Disabilities  
Family and Community Medicine



1521 E. Helen Street  
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Fax: (520) 626-0081

<http://sonoranucedd.fcm.arizona.edu>

August 17, 2020

Arizona Developmental Disabilities Planning Council  
Attn: Grants Review Committee  
3839 N. 3<sup>rd</sup> Street, Suite 306  
Phoenix, AZ 85012

**RE: RFGA FFY20-SACD-A1 – Self-Advocacy Coalition Building in Arizona Communities**

Dear Committee Members:

The Sonoran Center for Excellence in Disabilities is pleased to support the application for funding submitted by Southwest Institute for Families and Children (SWI) and The Arc of Arizona related to the 2020 Self-Advocacy Coalition Building grant opportunity.

The Sonoran Center, a University Center for Excellence in Disabilities (UCEDD) located in the Department of Family and Community Medicine at the University of Arizona, is focused on partnering with the community to expand possibilities and enhance independence for people with disabilities and their families through interdisciplinary training of students and service professionals, research, technical assistance and information sharing, and exemplary services and model program development. We are driven by the vision that community's benefit from the full participation of all members, with recognition of the strengths brought by diversity in abilities, culture, age, and life-experience. Your project directly promotes our mission and values with a focus and agenda that we support and are pleased to be a part of. Building a self-advocacy coalition is greatly needed in Arizona. SWI and The Arc are uniquely qualified and have a demonstrated track record of successful accomplishments in this area. We know first-hand the quality of your work and look forward to collaborating with you on this worthwhile project.

While great progress has been made, the Sonoran UCEDD recognizes much more must be done to build strong state-based and national networks of self-advocates. We are confident the coalition-building project proposed by Southwest Institute and The Arc of Arizona will achieve meaningful results in Arizona. With their collective expertise in serving individuals with disabilities through training, public policy, and community outreach, as well as the experience in self-advocacy they bring to the effort individually and through their organizational networks, these two agencies are ideally positioned to make a significant contribution to the development of a true statewide self-advocacy coalition. Our organization is committed to working with SWI and The Arc on this effort through an in-kind donation of staff support, utilizing our expertise and experience, to ensure optimal outcomes and meaningful growth in Arizona's self-advocacy community.



Sonoran University Center of Excellence  
In Developmental Disabilities  
Family and Community Medicine



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I am pleased to offer this recommendation on behalf of the Sonoran UCEDD and wholeheartedly endorse the combined request by Southwest Institute for Families and Children and The Arc of Arizona. Should you have any questions, please feel free to contact me at [wparentjohnson@arizona.edu](mailto:wparentjohnson@arizona.edu) or 785.764.2472 (cell).

Sincerely,

A handwritten signature in black ink that reads 'Wendy Parent-Johnson'.

Wendy Parent-Johnson, PhD  
Executive Director, Sonoran UCEDD