

Supported Decision-Making Pilot Project

Narrative responses and attachments

1. Provide a description of your funded program and include a description of the target community and target participation. State why the ADDPC should continue funding your program for another one-year period.

The Supported Decision-Making Pilot Project aim is to increase the use of supported decision-making as a less restrictive alternative to legal guardianship among people with intellectual and developmental disabilities in Arizona. The target audience of the project includes people with intellectual and developmental disabilities, their families and caregivers, as well as relevant stakeholders in the medical, legal, and educational professions. Furthermore, the goal of the project is to enact legislation that recognizes supported decision-making as a less restrictive alternative to guardianship.

The Arizona Developmental Disabilities Planning Council should continue to fund The Supported Decision-Making Pilot Project. Unnecessary guardianship is a problem that continues to plague the I/DD community. Parents and caregivers are often advised to pursue guardianship when their loved ones turn 18 without being given information on other options such as supported decision-making. While guardianship might be a viable and necessary option for some, it is clear that there are many who are placed under guardianship and have their rights unnecessarily taken away. The work of the Supported Decision-Making Pilot Project is an important step in trying to reduce the use of unnecessary guardianship. By continuing to fund the pilot project, people with I/DD, their families and caregivers, as well as relevant stakeholders can continue to receive the education necessary to understand the benefits of supported decision-making.

2. Summarize key program achievements for the current funding year. Include all key activities that have been undertaken based on the current implementation plan. Describe activities are left to complete in the last quarter. Detail any barriers that were addresses and at least one success story.

During year two of the Supported Decision-Making Pilot Project, the goals of the project included passing legislation recognizing supported decision-making and providing education about supported decision-making to people with IDD and relevant stakeholders. During the first half of the year, we were able to make significant program achievements. Thanks to the support from community members wanting to see supported decision-making recognized in Arizona, we were able to get the supported decision-making bill passed almost unanimously through the House of Representatives. Furthermore, the curriculum created for supported decision-making was turned into short video presentations and uploaded to the supported decision-making website. While we did have some success this year, we did encounter some setbacks that have caused us to rethink our strategy to reach our intended goals and objectives.

The coronavirus outbreak that has gripped the world has had a major impact on implementing the strategic plan submitted to the advisory committee and ADDPC. While our focus was to enact legislation regarding supporting decision-making, the virus caused the legislation to stall while legislators focused on passing virus relief bills and creating a state budget. Furthermore, all

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planned face-to-face meetings were also subsequently canceled to avoid taking unnecessary risks and spreading the virus.

While the coronavirus has had an impact on our ability to accomplish our goals and objectives set forth in the strategic plan, the pilot project partners have worked with the advisory committee to amend the strategic plan to include online trainings for people with disabilities, their supports, as well as social service providers, educators, and legal and medical providers. The trainings will take place during the fourth quarter of the project.

Although we were not able to provide face-to-face trainings, we were able to accomplish our goal of creating online videos of the supported decision-making curriculum. Each chapter of the curriculum was turned into a video and uploaded to YouTube. The videos are currently being hosted on the SWI website. Each video breaks down the curriculum in an easy-to-understand manner. Furthermore, any chapters that include activities can be directly downloaded from the website under their corresponding videos.

3. Describe community partners involved and their role in this project

The Supported Decision-Making Pilot Project partners include Southwest Institute for Families and Children (SWI), The Arc of Arizona, and Arizona Center for Disability Law (ACDL). Each partner works together to reach the goal of increasing the use of supported decision-making among people with intellectual and developmental disabilities in Arizona. To this end, SWI is the project lead and is mainly focused on developing curriculum and trainings on supported decision-making for people with disabilities and relevant stakeholders. The Arc of Arizona takes the project lead in crafting and pushing forward legislation around supported decision-making. Furthermore, The Arc of Arizona works with SWI to provide presentations and trainings on supported decision-making. The third member of our partnership, ACDL, provides the legal guidance and support needed to implement supported decision-making in Arizona. ACDL works with SWI and The Arc of Arizona on all presentations and trainings. They also work with The Arc of Arizona to craft legislation around supported decision-making.

Aside from the three main project partners, the pilot project also utilizes an advisory committee to provide feedback and guidance on the implementation of the project goals and objectives. The advisory committee consist of members from DDD, Vocational Rehabilitation, Department of Education, Raising Special Kids, DDPC, the Sonoran UCEDD, IHD, lawyers, medical professionals, parents, and self advocates.

4. Describe how feedback from participants, family members or other stakeholders was gathered and used to support or change your project.

During year two of the pilot project, the first part of the year mostly involved trying to get legislation passed. We worked with state representatives Jennifer Longdon and John Allen. While both representatives liked the idea of supported decision-making, Representative John Allen reviewed our proposed legislative bill and had some concerns. The Arc of Arizona met with the representatives and members of the judiciary to discuss the legislation and made a few minor changes to meet the concerns of all parties. The changes in the legislation had no real

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impact on recognizing supported decision-making and we felt comfortable and still trying to push forward the legislation.

While we were not able to do many face-to-face meetings to teach supported decision-making, we will be doing online trainings during the fourth quarter of the year. In those online trainings we will review the questions asked during the training to see where we can improve our presentations to make sure we cover all areas of supported decision-making the concern people. We will also be sending out surveys to those who participate in the trainings to gain their feedback and use that information to further improve our presentations.

5. Describe efforts to work in or promote the program in underserved or unserved areas of the state or with certain populations that are often overlooked.

Our goal for year two was to reach out to the Hispanic population by providing Spanish language face-to-face meetings in Phoenix and in Tucson. Unfortunately, we were not able to conduct those meetings because of the pandemic. However, we have translated the curriculum and have posted the curriculum on the supported decision-making website. We are also planning to conduct one online training for people with disabilities and their supports in Spanish.

Aside from conducting presentations for the Latino community, our goal was also to reach out and do presentations for the Native American community. During year two we planned to conduct face-to-face trainings in northern Arizona with a concerted effort to reach out to the Native American population. We also planned to do a presentation at the American Indian Disability Summit. Unfortunately, due to the virus we were not able to conduct the trainings nor present at the summit. We are currently trying to reach out to the Native American community to inform them about the online trainings so that they may participate in those trainings.

6. Summarize evaluation findings to date, including the number of participants served, and their level of satisfaction. Explain if the program is on track with proposed target numbers; if not, describe barriers to reaching target numbers. Include other data/performance measures you are tracking and reporting to the ADDPC.

Due to the coronavirus we were not able to do any face-to-face presentations as has previously been discussed. However, the fourth quarter of the year will include several online presentations. Some of those presentations have started to take place and we have received positive feedback. In August we hosted an online training for people with disabilities, their families, and caregivers. We had 12 people participate and each participant had an opportunity to ask questions during the presentation. We are still in the process of collecting evaluations from the participants and will include that information in our fourth-quarter report.

7. Describe any new changes that will be implemented, including program design, target numbers, collaborators, implementation, staffing, evaluation, and other activities.

Due to the coronavirus, the project partners were forced to amend the strategic plan to include online trainings. During the fourth quarter of year two, the project partners will conduct six

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online presentations. The online presentations will include two for people with disabilities and their supports, two for educators, one for social service providers, one for medical providers, and one for legal professionals. While those are the scheduled presentations we have committed to doing in the amended strategic plan, members of the advisory committee have informed us of other opportunities to conduct trainings. We will work with the advisory committee members to identify possible training opportunities and conduct those trainings in addition to those we have scheduled on our own.

8. Describe other sources of funds that are committed to support the project. Will this project continue without ADDPC funding?

The project currently does not have any other source of funding. However, the project will continue without ADDPC funding in its online version. SWI will continue to host the supported decision-making website that includes links to the training curriculum and online videos. SWI will also continue to administer the supported decision-making Facebook page to continue to provide information regarding supported decision-making in Arizona as well as nationwide.

9. **Attachment 1:** Provide an implementation Plan that lists out sequentially the key activities to undertake in the next year. At a minimum, the implementation plan shall list the key task, the party that is responsible when it will be completed (date) and by what method you will know completion is met (measurement).

Please see attached document

10. **Attachment 2:** Provide a 12-month Budget Request and Match. Use the Budget summary Form and provide a detail budget narrative for both requested dollars and match.

Please see attached documents

11. **Attachment 3:** Provide a list of key staff and briefly summarize the job responsibilities for this grant. List any training or certification required for staff in the upcoming year. Ensure personnel cost are appropriately allocated for the Budget. Do not attach resumes.

Please see attached documents

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SDM Year 3 Timeline

Activity	Responsible organization	Measurement	1	2	3	4	5	6	7	8	9	10	11	12
SDM Advisory meetings	SWI ACDL The Arc of AZ	Meeting minutes	X		X			X			X			X
Meet with Legislators to reintroduce SDM legislation	SWI ACDL The Arc of AZ	Scheduled meetings		X	X	X								
Once a month poster and video blogs about the SDM Legislation	SWI ACDL The Arc of AZ	Videos blog and posters			X	X	X	X						
Meet with legislators to educate about SDM	SWI ACDL The Arc of AZ	Scheduled meetings			X	X	X	X						
On-line training for people with disabilities and supports	SWI ACDL The Arc of AZ	Scheduled webinars	X		X									
In-person training for people with disabilities and supports in Phoenix	SWI ACDL The Arc of AZ	Scheduled trainings								X				
In-person training for people with disabilities and supports in Tucson	SWI ACDL The Arc of AZ	Scheduled trainings								X				
In-person training for people with disabilities and supports in Flagstaff	SWI ACDL The Arc of AZ	Scheduled trainings										X		
On-line training for social service providers	SWI ACDL The Arc of AZ	Scheduled webinars		X		X		X						
In-person training for social service providers in Phoenix	SWI ACDL	Scheduled trainings								X				

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Activity	Responsible organization	Measurement	1	2	3	4	5	6	7	8	9	10	11	12
In-person training for social service providers in Tucson	The Arc of AZ SWI ACDL The Arc of AZ	Scheduled trainings									X			
On-line training for educators and school admin	SWI ACDL The Arc of AZ	Scheduled webinars		X		X		X						
In-person training for educators and school admin in Phoenix	SWI ACDL The Arc of AZ	Scheduled trainings											X	
On-line training for medical professionals	SWI ACDL The Arc of AZ	Scheduled webinars				X								
In-person training for medical professionals in Phoenix	SWI ACDL The Arc of AZ	Scheduled trainings											X	
In-person training for medical professionals in Tucson	SWI ACDL The Arc of AZ	Scheduled trainings												X
On-line training for legal professionals	SWI ACDL The Arc of AZ	Scheduled webinars		X				X						
In-person training for legal professionals in Phoenix	SWI ACDL The Arc of AZ	Scheduled trainings								X				
In-person training for legal professionals in Tucson	SWI ACDL The Arc of AZ	Scheduled trainings									X			

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Budget Request form

Contractor Name: Southwest Institute for Families and Children

Contractor Address: 255 E. Osborn Rd, Suite 103 Phoenix, AZ 85012

Project Name: Supported Decision-Making Pilot ProjectY3 ADDPC-FFY18-SDM-010

Budget Category	Requested ADDPC Funds	Non-Federal Cash Match	Non-Federal In-Kind Match	Total Program Cost
Personnel/Salaries	19373.33		3095.05	22,468.38
Fringe Benefits	2683.20		428.66	3111.86
Supplies I Operating Expenses printing	0		400	400
Travel	0		897.28	897.28
Rent or Cost of Space	0		0	
Contracted Services I Professional Services	37,186.60		14,575	51,761.60
Administrative /Indirect Costs			520	520
TOTAL	59,243.13		19,915.99	79159.12

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

AZ SDM Budget Narrative Y3

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Personnel/Salaries, 22,468.38

George Garcia, \$10,140

Project Director George Garcia, MSW .15 FTE (\$10,140) salary for one year x \$50,000/annual wage to serve as the senior administrator, provide programmatic oversight, develop, deliver, and evaluate supportive decision making trainings.

George Garcia \$1215.05 in-kind

Juliana Huereña \$7,500

Logistics Consultant to training participants- Juliana Huereña, MT-BC, .17 FTE (\$7,500) salary for one year x \$45,000. Participate with Garcia to develop, deliver, and evaluate supportive decision making trainings.

Bill Lucero \$1733.33

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

Priscilla Perkins, \$1880

Priscilla Perkins in-kind will provide bookkeeping and financial support for the project.
Priscilla Perkins, .035 X \$53,200/annual wage to maintain the financials and HR for the project.

Fringe Benefits, \$3111.86

Employee Related Expenses -SWI has a formula that yields the following: 13.85% which includes FICA 6.2%, Medicare 1.45%, and FUTA 6.2%.

George Garcia, \$10,140 X 13.85% = \$1404.39

George Garcia in-kind \$1215.05 X 13.85% = 168.28

Juliana Huereña, \$7,500 X 13.85% = \$1,038.75

Bill Lucero, \$1733.33 X 13.85% = \$240.06

Priscilla Perkins in-kind, \$1880 X 13.85% = \$260.38

Supplies/Operating Expenses in-kind \$400

Office supplies (copy paper, transparent paper, binder coils, and ink)

Travel, \$897.28 in-kind

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

Flagstaff 1 visit \$325.20

Hotel: \$0

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Ground transportation: 280 miles round trip X 2 cars X X .445 = \$249.20

Per diem: \$19 X 4 people = \$76

TOTAL = \$650.40

Rent or Cost of Space, \$0

Contractual Services/Professional Services, \$37,186.60

Arizona Center for Disability Law will be an advisory committee member and facilitator. They will be lead organization in creating the curriculum for legal stakeholders and provide CEUs to attorneys, attorney staff, and judges. They will assist in teaching support decision-making for individuals with I/DD and family members and supports. They will work with **The Arc of Arizona** to draft legislation regarding supported decision-making.

Arizona Center for Disability Law will receive **\$18573.30** for the work provided in the grant.

J.J. Rico CEO of ACDL: 8.5 hours x \$250/hour= \$ 2,125

Staff Attorney Sey In: 75 hours x \$185.00/hour= \$13,875

Natalie Luna Rose - Communications and Outreach: 9.6 hours x \$100/hour= \$960

Arizona Center for Disability Law Match

Arizona Center for Disability Law will provide a matching fund of **\$9200** that will be divided between the use ACDL staff and interns working on the grant and the use of the Ability360 conference room.

ACDL staff: 46 hours x \$145.00/hour= \$6,670.00

Intern (ASU & UofA Law Students): 25 hours x \$50.00/hour= \$1,250.00

Ability 360 Conference Room Rental: 16 hours x \$80.00/hour= \$1,280.00

The Arc of Arizona will be an advisory committee member and facilitator. They will assist in teaching supported decision-making for individuals with I/DD and family members and supports and teaching curriculum for social service providers, medical, and other professional stakeholders. The Arc of Arizona will draft legislation regarding supported decision-making. Services in the amount of **\$18,613.30**

The Arc of Arizona Match

The Arc will provide an in-kind match in the form of technical assistance from the Public Policy staff of The Arc of the United States. Nicole Jorwic, JD, Senior Director of Public Policy for The Arc 25 hours X \$215 = **\$5375**

Administrative/Indirect Cost, In Kind match of \$520

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Key staff

George Garcia

Executive Director Southwest Institute for Families and Children

George Garcia is project director for the Supported Decision-Making Pilot Project. George will be responsible for submitting all reports and documentation to the ADDPC. George will also be working with ACDL and The Arc of Arizona to provide trainings to people with IDD, families, caregivers, social service providers, and health care workers. George will also work with the grant partner organizations to provide education and support of supported decision-making legislation.

Juliana Huereña

Operations Manager Southwest Institute for Families and Children

Juliana will be responsible for providing trainings to people with IDD, families, caregivers, social service providers, and health care workers. Juliana will also be responsible for notetaking and minutes collected during advisory committee meetings.

Bill Lucero

program aide

Bill will be responsible in assisting SWI staff in implementing the supported decision-making project. Part of Bill's duties include graphic design for flyers and other advertisements, social media post, and website maintenance.

Sey In

Staff Attorney

Sey has been assigned 75 hours of Project time

3 years law school experience in health law policy and 1 year as a licensed attorney

Sey will be one of the attorneys working in the project. Sey will be the lead ACDL staff member assigned to the Project. Sey will be responsible for all tasks identified in the year two renewal timeline.

Natalie Luna Rose

Outreach and Communications Manager

Variable depending on needs of grant. Natalie has been assigned 9.6 hours of project time.

2 years as staff member for ACDL

Natalie will be one of three ACDL staff members working in the project. More specifically, Natalie will be assigned to working on the tasks related to submitting legislation to the AZ legislature and educating legislators and the public about the SDM bill.

J.J. Rico

Chief Executive Officer (CEO)

Variable depends on needs of the grant. J.J. has been assign 8.5 hours of project time.

18 years (Staff Attorney, Litigation Director, and CEO)

J.J. will be the third ACDL staff member working on the project. More specifically, J.J. will be assigned to working on the tasks related to submitting legislation to the AZ legislature and

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educating legislators and the public about the SDM bill. J.J. may also be responsible for conducting training for legal professionals and trainings held in Tucson.

Jon Meyers

The Arc of Arizona

The Arc of Arizona will be an advisory committee member and facilitator, assisting in creation and implementation of curricula for individuals with I/DD and family members/caregivers, legal professionals, healthcare and social services providers, and educators. The Arc will be the lead in refining draft legislation for introduction in the 2020 Arizona legislative session, stewarding the bill through the legislative process, and working toward passage. The Arc will also engage in additional formal and ad hoc outreach to raise awareness of SDM within a variety of stakeholder communities.

Nicole Jorwic,

JD, Senior Director of Public Policy for The Arc,

Nicole will: review draft legislation and make recommendations, as appropriate, utilizing experience gained on SDM efforts in other states; offer in-state and remote consultation on work with legislators and legislative staff, including accompanying SWI, ACDL, and The Arc of Arizona to a limited number of meetings with state legislators and staff; and provide guidance in outreach to stakeholder communities as we educate them to increase both grassroots advocacy for passage of the bill and support for implementation once the bill passes.