



# Offer and Acceptance

**AZ Developmental Disabilities  
Planning Council**

SOLICITATION NO.: ADDPC-FFY20-SACD-A1

PAGE  
1

3839 North Third Street, Ste. 306

OFFEROR:

OF  
1

Phoenix, AZ 85012

## OFFER

### TO THE STATE OF ARIZONA:

The Undersigned hereby offers and agrees to furnish the material, service or construction in compliance with all terms, conditions, specifications and amendments in the Solicitation and any written exceptions in the offer. Signature also certifies Small Business status.

Southwest Institute for Families and Children

Company Name

255 E. Osborn Rd, Suite 103

Address

Phoenix, AZ 85012

City State Zip

George Garcia

Signature of Person Authorized to Sign Offer

George Garcia

Printed Name

Executive Director

Title

Phone: 602-235-0354 X801

g.garcia@swifamilies.org

Contact Email Address

By signature in the Offer section above, the Offeror certifies:

1. The submission of the Offer did not involve collusion or other anticompetitive practices.
2. The Offeror shall not discriminate against any employee or applicant for employment in violation of Federal Executive Order 11246, State Executive Order 2009-9 or A.R.S. §§ 41-1461 through 1465.
3. The Offeror has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer. Failure to provide a valid signature affirming the stipulations required by this clause shall result in rejection of the offer. Signing the offer with a false statement shall void the offer, any resulting contract and may be subject to legal remedies provided by law.
4. The Offeror certifies that the above referenced organization    IS/    IS NOT a small business with less than 100 employees or has gross revenues of \$4 million or less.
5. The Offeror is not debarred by, or otherwise prohibited from participating in any publicly-funded contract awarded by any Federal, State or local jurisdiction.

## ACCEPTANCE OF OFFER

The Offer is hereby accepted.

The Contractor is now bound to sell the materials or services listed by the attached contract and based upon the solicitation, including all terms, conditions, specifications, amendments, etc., and the Contractor's Offer as accepted by the State.

This Contract shall henceforth be referred to as Contract No. \_\_\_\_\_.

The effective date of the Contract is \_\_\_\_\_.

The Contractor is cautioned not to commence any billable work or to provide any material or service under this contract until Contractor receives purchase order, contract release document or written notice to proceed.

State of Arizona  
Awarded this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

Erica McFadden, PhD, MSW, Executive Director

## Self Advocacy Coalition Grant Narrative

**Describe a) your work in the disability community; b) list active board members and their organizational role and describe how often your board meets; c) provide a list of grants received in the past 3 calendar year (2019, 2018, 2017)**

Southwest Institute for Families and Children with Special Needs (SWI) has worked in the disability community for the past 20 years. Working on a national, state, and local level, SWI has been involved in all aspects of disability issues including: education, transition, healthcare, employment, and self advocacy.

In 2001, SWI received the Healthy and Ready to start grant from the Health and Human Service Administration. In the program, SWI formed the self advocacy group known as the Youth Action Council of Arizona (YAC-AZ) in the 5-year grant. Using Community-Base Participatory Research (CBPR), through a curriculum development by SWI known as FAST TRACK, members of YAC-AZ learned about transition issues and how to address any barriers as youth with disability transitioned into adulthood.

In 2007, SWI was awarded a 3-year grant Project of National Significance from the Administration on Community Living for the Set Yourself Free Project. The goals of the project were to establish a network of youth leadership that would in turn mentor other youth with disabilities as they transition into adulthood. The project also developed partnerships with state agencies such as the Arizona Department of Education to develop youth tracks in their yearly statewide transition conference.

In 2011, SWI was awarded a 3-year grant from the Arizona Developmental Disabilities Planning Council (ADDPC) for its project Supporting People in Empowerment, Advocacy, and Knowledge (SPEAK). The purpose of the grant was to strengthen existing self advocacy groups and increase their ability to be self-sufficient. To do so, SWI developed the SPEAK curriculum that teaches self advocacy groups how to develop mission statements, goals and objectives, bylaws, recruitment, and sustainability. SWI worked with 5 self advocacy groups from around the state including: Tucson, Phoenix, and Kayenta.

In 2012, SWI applied and was awarded a grant from the ADDPC to provide a statewide Self Advocacy Conference. The conference brought about 100 self advocates from around the state to learn about healthcare, employment, education, and self advocacy. At the end of the conference, self advocacy groups in attendance were given an opportunity to talk about their self advocacy group.

In 2013, SWI applied and was awarded a grant from ADDPC to provide an Art Conference. The purpose of the conference was to teach people with intellectual and developmental disabilities a way of expressing themselves and increasing their self advocacy skills through art. Conference goers learned about painting, digital photography, dance, and acting. At the end of the conference, participants displayed their paintings and were treated to a play from the Improbable Theatre group.

In 2014, SWI was awarded a 3-year Project of National Significance grant from the Administration on Community Living to develop a regional technical assistance center called

## Self Advocacy Coalition Grant Narrative

Southwest Technical Assistance Center. SWI worked with 6 states including: Arizona, Utah, Colorado, New Mexico, Texas, and Ohio. Each state developed a state plan with goals and objectives to increase self advocacy and partnerships with state agencies. Self advocates from each state would travel to Phoenix twice a year to discuss progress on their state plan and address any barriers that they encountered. Over the course of 3 years, each state reported progress in increasing self advocacy among people with intellectual and developmental disabilities. In addition, each state group conducted educational webinars for self advocacy groups to develop stronger organizational structures. Furthermore, each group created videos on issues affecting self advocates in their local communities.

In 2016, SWI partnered with Self Advocates Becoming Empowered and 3 other self advocacy technical assistance centers to form the Self Advocacy Resource and Technical Assistance Center (SARTAC). Funded as a 5-year Project of National Significance grant from the Administration on Community Living, SARTAC serves as a national resource for self advocacy groups looking for information on a variety of topics including: organizational structure, healthcare, voting, education, and employment. SWI works with SARTAC to facilitate a national advisory committee that reviews resources, creates educational toolkits, and serves as a national think tank on all issues regarding intellectual and developmental disabilities.

In 2018, SWI and its partners The Arc of Arizona and Arizona Center for Disability Law were awarded a grant from ADDPC to begin the Supported Decision-Making Pilot Project (SDM). The goal for the project is to increase the use of supported decision-making among people with intellectual and developmental disabilities as a less restrictive alternative to guardianship. To do so, curriculum has been created geared towards people with disabilities, families and caregivers, and relevant stakeholders to provide education about SDM and they can development supported decision-making agreements. Aside from education, SWI and its grant partners are working to have legislation passed that would recognize supported decision-making as a less restrictive alternative to guardianship.

In 2018, SWI received funding from ADDPC to provide vote training. SWI worked with the Arizona Center for Disability Law to train people with disabilities about voting in Arizona. Over 9 trainings were conducted throughout the state including Nogales, Flagstaff, and Phoenix. 5 of the trainings were presented to youth from the Arizona Youth Leadership Forum.

SWI maintains an active board that is representative of the community it serves that meets on a quarterly basis. Our board currently has 3 active members of the 5 total board members allowed for in our bylaws. SWI leadership and its board president are actively recruiting for additional members. Our current board consists of: David Carey from ability360 as the President, Jay Dashefsky Secretary/Treasurer, and Sara Wilson from Home Assist Health. Each board member has worked with SWI in providing their expertise on various projects. David Carey and Jay Dashefsky are founding members of YAC-AZ and continue to provide assistance through presentations, mentorship, and youth recruitment.

### **List of grants**

Grants in 2019

ADDPC funded Supported Decision-Making Pilot Project

## Self Advocacy Coalition Grant Narrative

ADDPC funded AZ GoVoter  
Contract partnership with SABE SARTAC  
Contract partnership with SABE GoVoter

Grants 2018  
ADDPC funded Supported Decision-Making Pilot Project  
ADDPC funded AZ GoVoter  
Contract partnership with SABE SARTAC  
Contract partnership with SABE GoVoter

Grants 2017  
ACL funded Southwest Technical Assistance Center  
Contract partnership with SABE SARTAC  
Contract partnership with SABE GoVoter

For nearly 70 years The Arc has been this nation's leading organization advocating for the rights of individuals with I/DD. Since 1958, The Arc of Arizona has carried the work forward in this state. Over these decades, The Arc has consistently been seen as an example of effectiveness in public policy, advocacy, and grassroots organization.

The Arc of Arizona promotes and protects the human rights of all Arizonans with intellectual and developmental disabilities (I/DD) -- actively supporting their full inclusion and participation in the community throughout their lifetimes, improving systems of supports and services, connecting families, and influencing public policy. Through its advocacy and public policy work, The Arc of Arizona is instrumental in effecting systems change to benefit Arizonans with I/DD. In recent years, The Arc of Arizona has been responsible for legislation that added individuals with I/DD to the state's Silver Alert System, implemented a publicly-available online Adult Protective Services directory, and improved monitoring of adult developmental homes.

In addition to policy and advocacy efforts, The Arc of Arizona conducts several annual programs to educate, enlighten and entertain Arizonans affected by I/DD:

***Wings for Autism*** – Wings for Autism is an “airport rehearsal” event designed to alleviate the stress experienced by families who have a child with autism when traveling by air. The program provides families with the opportunity to practice entering the airport, obtaining boarding passes, going through security, and boarding a plane. *Wings for Autism* also gives airport, airline, and Transportation Security Administration professionals and other personnel the opportunity to observe, interact and deliver their services in a structured learning environment. This experience is equally useful for families that have a member with other intellectual or developmental disabilities that are concerned about the ability of their family member to travel.

The Arc of Arizona operates the nation's largest *Wings for Autism* event, annually serving approximately 275 children with autism and their family members.

**Sprout Film Festival** – Focusing exclusively on films that celebrate the diverse lives and creativity of people with intellectual and developmental disabilities (I/DD), the Sprout Film

## Self Advocacy Coalition Grant Narrative

Festival strives to challenge assumptions and break down stereotypes. By introducing powerful, thought-provoking films from around the world to new and ever-more inclusive audiences, The Arc promotes greater acceptance, celebrates differences and lights the spark to help make the invisible, visible.

Sprout films feature actors whose lives reflect the joys and challenges their characters face. These are not “star” vehicles for well-known actors to portray individuals with I/DD. Rather, all roles depicting persons with disabilities are played by persons with actual disabilities.

**Autism and I/DD Resources Conference** – Arizona is home to more than 150,000 residents with intellectual or developmental disabilities (I/DD) – Down syndrome, Autism Spectrum Disorders, Fetal Alcohol Spectrum Disorders, cerebral palsy, Fragile X syndrome, and nearly 150 other diagnoses. Too often these individuals, and the many thousands of family members who care for them, find themselves without the resources to ensure a high quality of life, employment, appropriate self-determination, and full integration in the communities they call home. Since 2016, The Arc of Arizona’s annual Conference (held in collaboration with the Arizona Autism Coalition since 2019) has offered essential information, tools and expertise to guide family members and individuals with I/DD toward the financial, governmental, and educational resources they need.

The Arc of Arizona’s state-based board consists of three members: Michael Leyva (President), Grants Coordinator with the Arizona Developmental disabilities Planning Council; Marlene Greenberg (Vice President), a retired Special Education teacher and transition specialist; and Joseph Schneider (Treasurer), a corporate accountant.

### List of grants

#### Grants in 2019

Arizona Developmental Disabilities Planning Council - \$10,000

American Airlines - \$5,000

Dignity Health - \$2,500

MassMutual - \$2,500

Mercy Care - \$2,500

Touchstone Health Services - \$2,500

UnitedHealthcare/Optum - \$2,500

Fortress General Contracting - \$1,000

#### Grants in 2018

American Airlines - \$5,000

PayPal - \$5,000

Arion Care Solutions, LLC - \$2,500

Inspire - \$2,500

MassMutual - \$2,500

UnitedHealthcare/Optum - \$2,000

Dignity Health - \$1,500

Fortress General Contracting - \$1,000

S.E.E.K. Arizona - \$750

## Self Advocacy Coalition Grant Narrative

### Grants in 2017

American Airlines - \$5,000

Arion Care Solutions, LLC - \$2,500

MassMutual - \$2,500

Touchstone Health Services - \$2,500

Optum/UnitedHealthcare - \$2,000

Susan Marks & Advocates PLLC - \$1,700

Dignity Health - \$1,500

Alcock & Associates, PC - \$1,000

Denise Pias – Re/MAX Real Estate - \$1,000

PayPal - \$1,000

Transaction Warehouse - \$1,000

**Describe in detail previous work and success in community coalition building around a specific topic. How did you engage the community, what type of work was done, what communities were impacted, and what did you learn in those efforts: Is the community coalition still in place?**

In 2008, SWI began working with the Self Advocacy Coalition of Arizona. Funded by the ADDPC's predecessor, Governor's Council on Developmental Disabilities, the mission of the group was to enhance the rights and responsibilities of individuals with disabilities by establishing and maintaining working partnerships with individuals and advocacy groups. As part of the work of the Self Advocacy Coalition, the coalition brought together self advocates and self advocacy groups to work together to address issues that affect people with disabilities. Members met on a quarterly basis and also attended legislative update phone calls that would educate members and organize groups to attend legislative committee hearings to share their stories.

As part of the Set Yourself Free Project, SWI worked with the Self Advocacy Coalition to involve youth in the coalition through the self advocacy group, YAC-AZ. While the coalition was in existence, young adults with disabilities attended legislative rallies, met with legislators, and testified in front of legislative committees. SWI's involvement with the coalition provided a great insight as to how the legislative process works and how self advocacy can make a difference if people work together.

Through the work of the Self Advocacy Coalition of Arizona and its members, self advocates were able to prevent major budget cuts to social service programs that directly impacted people with disabilities. Unfortunately, the legislature decided to sunset the Governor's Council on developmental Disabilities and subsequently the Self Advocacy Coalition of Arizona lost funding. However, self advocacy groups such as YAC-AZ and People First of Arizona continue to organize and advocate on behalf of people with disabilities.

The Arc of Arizona has long been one of the leading organizations fighting for greater self-determination for individuals with I/DD and greater self-advocacy opportunities. This focus is

## Self Advocacy Coalition Grant Narrative

borne out in the organization's emphasis in recent years on passage of Supported Decision-Making (SDM) legislation, legislation that will provide statutory guidelines and protections for individuals with disabilities seeking to control the course of their own lives.

No single entity can succeed in an effort such as this and, as part of a joint ADDPC-funded project involving Southwest Institute for Families and Children and the Arizona Center for Disability Law, The Arc assembled a coalition of self-advocates, advocates, providers, and legal professionals to address the need for SDM acceptance in this state. The coalition, led by the three partner organizations with significant input from a diverse Steering Committee, undertook a three-step, multi-year campaign designed to:

1. Survey individuals with I/DD, family members/caregivers, providers, and professionals in healthcare, education, and law, to understand their understanding of and attitudes toward legal guardianship as well as the degree to which they are familiar with the concept of Supported Decision-Making;
2. Develop draft legislation for introduction in the Arizona Legislature, supported with advocacy conducted by coalition members; and
3. Create education materials and training programs, including written guides and online video tutorials, to educate Arizonans about SDM and other alternatives to legal guardianship, and to encourage families to adopt less-restrictive options for their children with I/DD rather than resort to legal guardianship except when indisputably necessary.

Because of the efforts of this coalition, within less than two years, tasks 1 and 2 have been accomplished: Community surveying was completed, followed by publication of a white paper with findings, and SDM legislation passed one chamber of the Legislature before the COVID-19 pandemic ended the 2020 session and killed its chances of passing the other. (The bill's Prime sponsor has already committed to re-introducing it in the 2021 session.) Task 3 is currently underway and utilization of the materials and trainings will be ongoing throughout years to come.

**Describe in detail how developing a self advocacy community coalition will be undertaken in year one. What activities will be planned with and for the self advocacy coalition? What will be implemented for the self advocacy community coalition to maintain engagement and growth through the first year?**

Southwest Institute, in partnership with The Arc of Arizona, proposes a project that will establish an effective self advocacy coalition that will create a network of self advocates and self advocacy groups throughout Arizona.

To establish an effective self advocacy network in Arizona, the project will utilize a three-pronged approach.

- Facilitate and serve as the administrative center for the Self Advocacy Solutions, Arizona's statewide self advocacy coalition
- Develop and/or strengthen self advocacy groups in Arizona

## **Self Advocacy Coalition Grant Narrative**

- Organize a statewide self advocacy conference

### **Facilitate Self Advocacy Solutions**

To establish a statewide self advocacy coalition, SWI and The Arc of Arizona will work with Self Advocacy Solutions, a newly formed self advocacy coalition in Arizona. The coalition is comprised of individuals and organizations interested in growing the self advocacy movement in Arizona. Current members include Southwest Institute for Families and Children, Southern Arizona Autism Association, Ability360, National Federation of the Blind of Arizona, representatives from all the known self advocacy groups in Arizona including the Youth Action Council of Arizona (YAC-AZ), People First of Arizona, People First of Tucson, as well as self advocates throughout Arizona. Coalition members are self advocates who have collective years of experience working in the disability field promoting the rights of people with disabilities and fostering the growth of self advocacy in Arizona.

The mission of Self Advocacy Solutions is, “To grow self advocacy in Arizona by supporting self advocacy groups, motivating cross disability involvement, engaging in public policy, and identifying opportunities for people with disabilities to speak up, changing society as a result.”

To accomplish their mission, Self Advocacy Solutions meets on a quarterly basis to discuss the issues facing people with disabilities, in particular those with intellectual and developmental disabilities, in Arizona. By understanding the issues facing people throughout Arizona, the goal is to create a unifying voice of self advocates working together to implement change.

Self Advocacy Solutions will also serve as the advisory committee to the self advocacy coalition grant. The grant partners, SWI and The Arc of Arizona, will work with the advisory committee to oversee the implementation of the grant goals and objectives, provide feedback on materials created, and assist in developing plans to overcome barriers.

Maintaining a statewide self advocacy coalition requires an administrative center to help facilitate meetings and handle the day-to-day operations of the coalition. Southwest Institute and The Arc of Arizona will serve as the administrative center for Self Advocacy Solutions, Arizona’s statewide self advocacy coalition.

SWI and The Arc of Arizona will have the following responsibilities:

- Organize all scheduled meetings
- Take meeting minutes
- Disseminate documents to all members as needed
- Organize and store documents
- Ensure accommodations are met as requested by attendees

### **Develop or Strengthen Self Advocacy Groups**



## Self Advocacy Coalition Grant Narrative

To establish a network of self advocacy groups in Arizona, SWI will work with up to five organizations or agencies that are willing to develop and/or strengthen a self advocacy group for people with developmental disabilities. Each organization will have a reimbursable budget of up to \$4000 to be used by the self advocacy groups.

Further requirements of each organization include the following:

- Provide an accessible meeting space or find a meeting space free of cost for the self advocacy group that will meet at a minimum of once a month.
- Each organization or agency must serve as the fiscal agent for the self advocacy group. Self advocacy groups will have a reimbursable budget of up to \$4000 to be used towards establishing their group and accomplishing their goals and objectives.

Expenses can include the following:

- Travel expenses for self advocacy members
  - Printing and publishing
  - Advertising
  - Materials
  - Registration fees
  - Speaker fees
  - Professional services
- Self advocacy groups must have a mission or vision statement, bylaws, and a strategic plan with goals and objectives by the end of the year funding. If the self advocacy groups have the above-mentioned requirements already in place, they may choose to revisit and ensure they accurately reflect the group or can choose to work on other items such as implementing their strategic plan.

Organizations and agencies working with self advocacy groups may use currently existing curriculum or newly developed curriculum to develop and/or strengthen self advocacy groups.

Curriculum must include at a minimum the following:

- Development of mission and/or vision statements
  - Bylaws
  - Choosing goals and objectives
  - Education on how to run successful meetings
- Self advocacy group must establish at least one goal with measurable objectives that is chosen by the self advocates and addresses an issue affecting people with developmental disabilities within their community, state, and/or nation. The goals and objectives chosen must reflect the change in strategy or activities from which the self advocacy group is

## Self Advocacy Coalition Grant Narrative

currently implementing. Choosing a goal and objective that is currently in place without reflecting a change in activity will not be accepted.

Objectives chosen must be specific, measurable, achievable, relevant to the goal and self advocacy group, and must have a timeframe for completion. As a result of reaching their goal, the self advocacy group must be able to demonstrate an outcome in which people with developmental disabilities have more control over their everyday lives and ability to make their own decisions. Goals must be short term and must be completed within one year of their creation. Examples of possible goals may include the following:

- Legislative
    - Supporting or opposing legislation affecting people with disabilities
    - Increasing the ability of people with developmental disabilities to advocate to their legislative representatives
    - Increasing voter registration and voting rights awareness among people with developmental disabilities
  - Community
    - Increasing public transportation options in the community for people with disabilities
    - Reducing barriers for people with disabilities within their communities
    - Stopping discrimination towards people with disabilities
  - Personal
    - Increasing self advocacy skills among people with developmental disabilities
    - Increasing knowledge of their rights as people with developmental disabilities
    - Increase involvement of people with developmental disabilities in self advocacy groups
- Self advocacy groups must become members of the self advocacy coalition known as "Self Advocacy Solutions". Each self advocacy group will have at least one representative participate in all meetings held by Self Advocacy Solutions.
  - Self advocacy groups must make an effort to attend the self advocacy conference that will be held at the end of the grant year. Each self advocacy group will be required to present information about their group and inform participants about their goals and objectives.

### **Self Advocacy and Disability Issues Conference**

Bringing together self advocates from around the state to meet and discuss the issues important to them is vital to developing an effective self advocacy network. The Arc of Arizona will spearhead the development of a one-day statewide self advocacy conference for people with intellectual and developmental disabilities. The conference will charge \$25 for all participants

## Self Advocacy Coalition Grant Narrative

and will include presentations from the self advocacy organizations who have received funding to provide information about their organization and their chosen goals and objectives.

Furthermore, the self advocacy conference will include the following:

- Presentations in the following areas:
  - Self advocacy skills
  - Healthcare
  - Education
  - Employment
  - Social services
  - Self advocacy group presentations
  
- Conference will be held in an accessible location and include all necessary accommodations as requested by participants
- A free lunch will be provided with options made available for those who request food accommodations
- Travel and lodging reimbursements will be provided for self advocates of the funded self advocacy organizations who are traveling more than 100 miles to attend the conference

To ensure self advocates play an active role in the implementation of all grant activities, Self Advocacy Solutions members shall form the advisory committee for the conference planning. The advisory committee will work with the grant partners in choosing conference location, presenters, and overseeing registration and program.

### **What strategies will be used to conduct outreach to unserved and underserved communities? What specific communities will be targeted?**

SWI and The Arc of Arizona will work with Self Advocacy Solutions to create and implement a plan to reach out to unserved and underserved communities in Arizona. Specifically, outreach to unserved and underserved communities will be geared towards rural communities in northern and southern Arizona with high concentrations of Native American and Latino demographics.

To advertise the opportunity for organizations and agencies throughout Arizona to receive funding to develop and/or strengthen self advocacy groups, SWI will implement a variety of different methods. Outreach will be done through social media, email listservs, and direct contact. Interested organizations and agencies will receive information about the requirements and will work with SWI to ensure they are meeting all requirements.

SWI will also advertise the self advocacy conference. Information about the conference will be disseminated using social media, list serves, and invitation to self advocacy groups throughout Arizona. Furthermore, funded self advocacy group will be required to advertise the conference in their communities and share information about possible travel scholarships for self advocates. A call for presenters will also be required to select presenters and topics for the conference.

## Self Advocacy Coalition Grant Narrative

### **What strategies will be used to work with, strengthen and include existing self advocacy groups into this project?**

To strengthen and including existing self advocacy groups in this project, self advocacy groups will have an opportunity to be part of all three aspects of the grant project. To establish a network of self advocacy groups in Arizona, SWI will work with up to five organizations or agencies that are willing to develop and/or strengthen a self advocacy group for people with developmental disabilities. Each organization will have a reimbursable budget of up to \$4,000 to be used by the self advocacy groups.

Self advocacy groups will also have the opportunity to be part of the statewide self advocacy coalition, Self Advocacy Solutions. The mission of Self Advocacy Solutions is, "To grow self advocacy in Arizona by supporting self advocacy groups, motivating cross disability involvement, engaging in public policy, and identifying opportunities for people with disabilities to speak up, changing society as a result."

Finally, self advocacy groups will be invited to participate in the statewide self advocate and disability issues conference. The conference will focus on issues facing people with disabilities throughout Arizona and the nation. By bringing self advocates and their organizations together, self advocacy groups will learn from each other and develop stronger connections, and understanding of the problems we face in their communities.

### **How will individual self advocate voices be part of the project and balanced with collaborators?**

To implement the project goals and objectives, Self Advocacy Solutions will also serve as the advisory committee to the self advocacy coalition grant. The grant partners, SWI and The Arc of Arizona, will work with the advisory committee to oversee the implementation of the grant goals and objectives, provide feedback on materials created, and assist in developing plans to overcome barriers.

Furthermore, the advisory committee will also oversee the development of the self advocacy and disability issues conference. As the advisory committee, members will have an opportunity to provide feedback from all materials created, conference location, presentations chosen, and ensure the conference meets the needs of self advocates.

**List who are the community partners that will be a part of this grant. Also denote who will be funded and the role they will be engaged in. Ensure Letters of Support are included in the grant application.**

## Self Advocacy Coalition Grant Narrative

The community partners who will receive funding in this grant will be SWI and The Arc of Arizona with SWI being the lead organization. In the grant, SWI and The Arc of Arizona will work together to facilitate the statewide self advocacy coalition. This will include all sub-committees and work groups. SWI will spearhead the implementation of the mini-grant program that will provide \$4,000 grants to organizations willing to work with self advocacy groups. The Arc of Arizona will be responsible for establishing a self advocacy and issues conference.

To implement the program, SWI and The Arc of Arizona will create an executive committee that will include consultants from the SONORAN and IHD/NAU UCEDD as well as Teresa Moore from Moore Advocacy Consulting. The role of the consultants will be to work with the grant partners to develop effective strategies in implementing the project goals and objectives using best practices before they are presented to the Self Advocacy Solutions advisory committee.

As Arizona's UCEDDs, their partnership in the program will provide us with valuable information regarding best practices in working with people with IDD in Northern and Southern Arizona. Their connections to their communities will assist in developing self advocacy groups and provide guidance as they develop.

Teresa Moore is one of the founding members of the original Arizona Self Advocacy Coalition. As an advocate for self advocates in Arizona as well as nationally, Teresa will provide guidance through her experience in developing Arizona's first Coalition. Teresa will also assist with creating an effective recruitment and advertising strategy.

Working with the grant partners, the self advocacy coalition, Self Advocacy Solutions, will serve as the advisory committee to the grant project. The grant partners will work with the advisory committee to oversee the implementation of the grant goals and objectives, provide feedback on materials created, and assist in developing plans to overcome barriers.

Self Advocacy Solutions is comprised of individuals and organizations interested in growing the self advocacy movement in Arizona. Current members include Southwest Institute for Families and Children, Southern Arizona Autism Association, Ability360, National Federation of the Blind of Arizona, representatives from all the known self advocacy groups in Arizona including the Youth Action Council of Arizona (YAC-AZ), People First of Arizona, People First of Tucson, as well as self advocates throughout Arizona. Coalition members are self advocates who have collective years of experience working in the disability field promoting the rights of people with disabilities and fostering the growth of self advocacy in Arizona.

### **What steps will be taken to address program barriers, including any problems with outreach, community coalition building, recruitment of self advocates and community partners and task.**

The grant partners SWI and The Arc of Arizona will work closely together to implement the project goals and objectives. While each organization will take responsibility for different aspects of the grant, the organizations will meet regularly along with their consultants to discuss progress and address any program barriers. Issues that cannot be resolved in a timely manner

## Self Advocacy Coalition Grant Narrative

will be brought to the attention of the advisory committee for further discussion and solution strategies. If there needs to be a change with the grant implementation, SWI will notify the ADDPC to discuss recommended changes.

To address barriers with outreach, community building, and recruitment of self advocates, SWI and its partners will rely on the expertise of Self Advocacy Solutions. Comprised of self advocates and organizations from around the state, members of the coalition will have the connections and knowledge necessary to address any issues face by the grant in their communities.

### **If funding is available for a second year, briefly describe what will be undertaken to sustain a self advocacy community coalition and what new activities will be implemented.**

The issues that affect people with disabilities are constant and ever-changing. Year 1 is about building the coalition. That is to say, SWI and its partner will work to build a coalition that recognizes its strength as a voice for people with disabilities as it brings people together to all address specific issues. The sustainability of the group will in part depend on the willingness of people to work together. After building up its unifying voice, year 2 will see the self advocacy coalition use its strength to enact change. Furthermore, success in advocacy will lead to more people wanting to get involved and the establishment of more self advocacy groups in Arizona. Self Advocacy Solutions must be ready to provide the support necessary to these newly formed self advocacy groups.

## Evaluation

### **Describe what you hope to achieve at the end of year 1.**

To establish an effective self advocacy network in Arizona, the project will utilize a three-pronged approach.

- Facilitate and serve as the administrative center for the Self Advocacy Solutions, Arizona's statewide self advocacy coalition
- Develop and/or strengthen a maximum of 5 self advocacy groups in Arizona through the use of mini grants worth up to \$5,000 each.
- Organize a statewide self advocacy conference

### **What are the key benchmark measurements (data points) that will be used to measure the grant objective is being met by the end of year 1?**

- Facilitate and serve as the administrative center for the Self Advocacy Solutions, Arizona's statewide self advocacy coalition  
Benchmark measurements: attendance records and meeting minutes
- Develop and/or strengthen a maximum of 5 self advocacy groups in Arizona through the use of mini grants worth up to \$5,000 each.  
Benchmark measurements: contracts with up to 5 organizations willing to support the development or strengthening self advocacy groups, goals and objectives developed and met by the self advocacy groups, and the participation of the self advocacy groups in the coalition
- Organize a statewide self advocacy conference  
Benchmark measurements: establishing of a conference planning committee, hosting a statewide self advocacy conference, and reviewing post conference evaluations

### **How will self advocates and community partner's involvement and feedback be used through the evaluation process?**

Self Advocacy Solutions members will serve as the advisory committee. The committee will ensure the grant objectives are met and provide feedback on any materials created or strategies developed. Committee members will also be part of the conference planning committee and will assist in choosing conference location, presentations chosen, and reviewing conference feedback.

### **If barriers are encounter, how will discussion of possible changes in program design take place?**

Barriers will be discussed between SWI and The Arc of Arizona to determine possible solutions. If the barrier requires a change in the program design, the grant partners will address it with the advisory committee and offer possible solutions to be voted on. SWI will then inform ADDPC of the barriers and the proposed solutions to discuss grant amendments.





# saavi



SAAVI Services for the Blind

Marcella Crane, Contracts Manager  
mcrane@azdes.gov  
Arizona Developmental Disabilities Planning Council  
3839 North Third Street, Suite 306  
Phoenix, Arizona 85012

Dear Marcella:

Saavi Services for the Blind knows that it's not what you can see that matters, it's what you can do. Over the past two years, Saavi Services for the Blind has worked closely with both Southwest Institute for Families and Children with Special Needs and The Arc of Arizona on a variety of issues. This includes the effort in developing a Arizona statewide Self-Advocacy coalition. Just as they do, we believe that Arizonans with disabilities have the right to be able to advocate for themselves in all areas of life, including employment, and full integration and participation in society.

This is why we are proud to support Southwest Institute for Families and Children with Special Needs and The Arc of Arizona in receiving the self-advocacy coalition building in AZ Communities Grant. Our involvement in Self Advocacy Solutions is important as we can provide representation and resources for the blind community and will help them bring together all people with disabilities to advocate in one voice. They have shown over the years that we have worked with them that they have what it takes to not only manage this grant but utilize the grant in a way that ensures maximum impact.

We look forward to working with both organizations as they carry out the grant, including serving on the advisory committee to the grant and help to monitor and provide feedback as the grant undertakes its goals and objectives.

We thank you for your consideration.

Sincerely,

Michael Gordon  
Chief Executive Officer  
Saavi Services for the Blind

**Tucson Office**  
3767 E Grant Road  
Tucson, AZ 85716

Tel: (520) 795-1331 / Fax: (520) 795-1336

**Phoenix Office**  
4222 E Thomas Road, Suite 130  
Phoenix, AZ 85018

Tel: (602) 795-0195 / Fax: (602) 595-6566

**Yuma Office**  
3795 W 22nd Lane, Suite 2  
Yuma, AZ 85364

Tel: (928) 276-4600 / Fax: (928) 782-375



For people with intellectual  
and developmental disabilities

Arizona Developmental Disabilities Planning Council  
Attn: Grants Review Committee  
38389 N. 3rd Street, Suite 306  
Phoenix, AZ 85012

May 13, 2020

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

Dear Committee Members:

Please accept this letter in support of the application for funding submitted by the Southwest Institute for Families and Children (SWI) and The Arc of Arizona related to the 2020 Self-Advocacy Coalition Building grant opportunity.

For nearly 70 years, The Arc of the United States has been at the forefront of the movement to build greater opportunity and greater inclusion of individuals with intellectual and developmental disabilities (I/DD) across this nation – including the movement to support individuals with I/DD to make their own voices heard, to influence the policies that affect them, and to determine the course of their own lives.

While great progress has been made, The Arc recognizes much more must be done to build strong state and local networks of self-advocates. We are confident that the coalition building project proposed by SWI and The Arc of Arizona will achieve meaningful results. 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.

The Arc  
1825 K Street NW, Suite 1200  
Washington, DC 20006

T 202 534-3700  
F 202 534-3731  
thearc.org

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Chief Executive Officer  
Peter V. Berns

**Achieve with us.**



**The Arc**

*For people with intellectual  
and developmental disabilities*

I am pleased to offer this recommendation on behalf of The Arc of the United States and wholeheartedly endorse the combined request by SWI and The Arc of Arizona. Should you have any questions, please feel free to contact me at [berns@thearc.org](mailto:berns@thearc.org) or (202) 534-3701.

Sincerely,

Peter V. Berns  
Chief Executive Officer  
The Arc of the United States

***Achieve with us.®***

### Self Advocacy Coalition Budget Form 2020-2021

Budget Category	Requested ADDPC Funds	Non-Federal Cash Match	Non-Federal In-Kind Match	Total Program Cost
Personnel/Salaries	22,000		9,500	31,500
Fringe Benefits	3,003		1,296.71	4,299.71
Supplies I Operating Expenses	0		2,000	2,000
Travel	10,047		0	10,047
Rent or Cost of Space	5,000		0	5,000
Contracted Services Professional Services	59,950		20,931	80,881
Administrative /Indirect Costs	0		0	0
<b>TOTAL</b>	<b>100,000</b>		<b>33,727.71</b>	<b>133,727.71</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  
Phone

G.Garcia@SWIfamilies.org  
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 \$10,050

SWI admin will travel around the state to work with self advocacy groups \$5,000 for 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 \$5,000**

Office space for meetings at SWI  $\$416.67 \times 12 \text{ month} = \$5,000$  for 20% usage of office space, including phone and internet services at SWI.

**Contracted Services / Professional Services \$80,881**

**\$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)

Jon Meyers \$3,156 for 55 hrs

**\$20,000** to distribute \$4,000 mini grants to 5 self advocacy groups.

( $5 \times \$4,000 = \$20,000$  per group).

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

In kind **\$3,000** for vendor table sales, (20 vendor tables X \$150).

**In kind \$3,750** will be from conference registration fees. (150 participants X \$25 registration fee).

**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 **\$3,000**.

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

In kind 1 person from **IHD/NAU** (30 hrs X \$50 = \$1,500).

**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)

### Applicant's Background Information Form

Complete each item, using attachments where necessary and label your response "Applicant's Background Information Form". Attachments shall indicate the item number and heading being referenced as it appears below. Failure to make full and complete disclosure may result in the rejection of your application as unresponsive.

1. Contact Name for Project: George Garcia

Organization Name: Southwest Institute for Families and Children

Address: 255 E. Osborn Rd, Suite 103

Phone Number: 602-235-0354 X801 Email: g.garcia@swifamilies.org

2. The Applicant is and was established when:

TYPE	YEAR ESTABLISHED
Corporation – Nonprofit	2001
University or Community College	
Unit of Local Government	
Indian Tribal Government	
Other	

3. As the lead applicant, read each statement carefully and mark Yes or No.

	YES	NO
a. Has any Federal or State agency ever made a finding of noncompliance with any relevant civil rights requirements with respect to your business activities? If YES, please attach an explanation.		X
b. Has the Applicant, its major stockholders with a controlling interest, or its officers been the subject of criminal investigations or prosecutions or convicted of a felony? IF YES, please attach an explanation.		X
c. Does the Applicant have sufficient funds to meet obligations on time under the Contract while awaiting reimbursement from ADDPC? If NO, please attach an explanation.	X	
d. Have any licenses ever been denied, revoked or suspended or provisionally issued within the past five years? If YES, please attach an explanation.		X
e. Have you or has your organization terminated any contracts, had any contracts terminated, had any liquidated damages assessed or been involved in contract lawsuits? If YES, please attach an explanation.		X
f. Do you, your staff, any of your relatives, or voting members of your Board of Directors maintain any ownerships, employments, public and private affiliations or relationships which may have substantial interest (as defined in A.R.S. §38-502, Conflict of Interest) in any contract, sale, purchase, or service involving the ADDPC? If YES, please attach an explanation.		X
g. Has your organization ever gone through bankruptcy? If YES, when? Include the State, District and case number.		X

4. Authorized Signatory:

George Darcia

Executive Director

(Name and Title of Authorized Signatory) is the signatory to this Contract on behalf of the Contractor and is responsible for the delivery of Contract Services during the term of this Contract.



## **Applicant's Qualifications Questionnaire**

**Briefly provide an overview of the lead organization that includes either your mission, vision or values. Describe how the organization is involved in the developmental disabilities community and summarize the programs and services provided. (Limited to one page)**

Southwest Institute for Families and Children with Special Needs (SWI) is a 501(c)(3) nonprofit organization based in Phoenix Arizona with a mission of supporting people with disabilities through empowerment, advocacy, and knowledge. To that end, SWI has worked tirelessly to improve the quality of life for people with disabilities by providing advocacy trainings, education, and support to individuals and organizations on both the local and national level for the last 20 years.

Services provided by SWI include:

### **Advocacy trainings for people with disabilities and their families:**

SWI works with people with a variety of disabilities including those with intellectual and developmental disabilities to improve their ability to advocate for themselves as well as others with disabilities. Our advocacy trainings are based on the independent living and self advocacy movement philosophies. We believe people with disabilities should have the right to live independent lives, free to make informed choices, and with all the supports necessary to live a healthy quality of life within an inclusive community.

In particular, SWI supports the self advocacy group Youth Action Council of Arizona (YAC-AZ). The meetings are free for anyone who would like to attend regardless if they have a disability or not and are streamed online for those who may not be able to attend in-person.

### **Career exploration and supported education for vocational rehabilitation clients:**

SWI works with vocational rehabilitation clients to assist them in choosing career goals that best meet the needs and interests of the client. Career goals are chosen based on the abilities of the client, their interests, and the viability of the chosen career.

### **Voting rights trainings:**

Working with Self Advocates Becoming Empowered and Arizona Center for Disability Law, SWI provides voting trainings to people with intellectual and developmental disabilities all throughout the state. The trainings are designed to be accessible and culturally sensitive. The goals of the trainings are to ensure people with disabilities understand their rights and responsibilities as voters, how the voting process works, and how voting pertains to their lives.

### **Supported Decision-Making**

SWI and its partners, Arizona Center for Disability Law and The Arc of Arizona, are working together to increase the use of supported decision-making agreements among people with intellectual and developmental disabilities as an alternative to legal guardianship.

### **SABE SARTAC**

SWI facilitates a national advisory committee and think tank of people with intellectual and developmental disabilities for the self advocacy resource and technical assistance center.

## **Applicant's Qualifications Questionnaire**

**Briefly describe the lead organization's experience, expertise, qualifications, and outcomes that demonstrate the applicant's ability to successfully deliver the proposed project requirements as described in the Scope of Work. If a Subcontractor will have key responsibilities, briefly describe their experience, qualifications, and expertise to carry out the project (Limited to one page)**

Southwest Institute for Families and Children with Special Needs (SWI) has worked in the disability community for the past 20 years. Working on a national, state, and local level, SWI has been involved in all aspects of disability issues including: education, transition, healthcare, employment, voting rights, organizational development, and self advocacy. Through its projects such as Supporting People through Empowerment, Advocacy, and Knowledge (SPEAK) and Southwest Alliance Technical and Assistance Center, SWI has the expertise and experience in organizing self advocates to develop self advocacy groups. In both projects, self advocates developed strategic plans with measurable goals and objectives that addressed the issues people with disabilities faced in their communities. Furthermore, SWI has experience bringing together people from various backgrounds to address common issues. Through its work with SARTAC, SWI has brought together self advocates from around the country to create a national think tank of disability experts developing best practice tools and resources for self advocates and self advocacy organizations.

Working with SWI is Jon Meyers from The Arc of Arizona. Mr. Meyers has been Executive Director of The Arc of Arizona since August 2013 and has spent more than 30 years as a non-profit executive specializing in resource development and organizational management. In his role with The Arc, he oversees state and federal public policy, advocacy, and outreach efforts supporting the civil rights and community inclusion of individuals with I/DD, including the organization's three major annual events – *Wings for Autism*, Sprout Film Festival, and Autism & I/DD Resources Conference. During his time with The Arc, the organization has successfully advocated for passage of key pieces of legislation to benefit Arizonans with I/DD. His prior experience includes work in higher education, the arts, animal welfare and human services. He holds a Bachelor of Arts degree in Theatre Arts and History from Santa Clara University.

**APPLICANTS PERSONNEL QUALIFICATIONS QUESTIONNAIRE**  
**APPLICATION NO. ADDPC-FFY20-SACD-A1**

**Complete a separate Personnel Qualifications Form for each staff that will be paid from the grant or will be conducting their work as Match.** This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring, at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

**1. Name of person:** George Garcia

**2. Position currently held with Applicant:** Executive Director

**3. Proposed position for contract service and percentage of time devoted to the contract service:** Program Director 22%

**4. Number of years with Applicant:** 13 years

**5. Identify the primary function(s) of this person in terms of providing services under this Contract:** George Garcia will be the program director for the grant. His responsibility will be to ensure SWI staff and subcontractors are meeting their goals and objectives as written in the timeline. George will also be a member of the executive committee, facilitate advisory committee meetings and self advocacy groups.

**6. Briefly describe the person's work experience, job training, formal education (Do not attach resumes):** George Garcia is the Executive Director of SWI for the past five years. Prior to becoming Executive Director, George was hired as the Youth Disability Outreach Coordinator for SWI 2007. His role included facilitating the Youth Action Council of Arizona, a self advocacy organization for young adults with IDD, providing technical support to self advocacy organizations in the state of Arizona, and participating in various boards, commissions, and committees geared towards people with disabilities. George's formal education includes a Bachelor's degree in history and a Master's degree in social work from Arizona State University.

**APPLICANTS PERSONNEL QUALIFICATIONS QUESTIONNAIRE**  
**APPLICATION NO. ADDPC-FFY20-SACD-A1**

Instructions: **Complete a separate Personnel Qualifications Questionnaire for each person** in a key personnel position, including if hiring subcontractors. This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

1. Name of person: Juliana P. Huereña

2. Position currently held with Applicant: Operational Manager

3. Proposed position for contract service and percentage of time devoted to the contract service: Project Director 24%

4. Number of years with Applicant: 10 years

5. Identify the primary function(s) of this person in terms of providing services under this Contract: Juliana P. Huereña will be part of the SWI grant team. Her role will be to assist in facilitating the advisory committee meetings and self advocacy groups. Juliana will also travel to various locations around the state to promote the self advocacy coalition and work with self advocacy groups.

6. Briefly describe the person's work experience, job training, formal education (Do not attach resumes): Juliana Huereña has a bachelor's degree in General Studies from Northern Arizona University, with a Minor in Business Management and a focus in English. She also has a Bachelor's degree in Music from Arizona State University. In July 2016 she received her 4<sup>th</sup> cycle board certification as a Music Therapist. She has been a board certified music therapist for 20 years. She has created, developed, implemented and evaluated music therapy programs for various organizations. Juliana has also supported the self advocacy movement from the beginning in Arizona with People First of Arizona and the Self Advocacy Coalition of Arizona. She was the Project Director for the SW Alliance Technical Assistance Center, a Project of National Significance from AIDD and worked with 5 states to strengthen self advocacy collaboration in their states. Juliana has also been a self advocacy statewide advisor and has been one of Self Advocates Becoming Empowered national advisor in 2011 and continues to work with SABE as staff on various project and social media (Facebook pages and the website). Past projects: OCSS and Coleman Technology, currently: the SABE GoVoter Project and SARTAC, RRTC on Employment, project, to name a few. She has visited several countries to talk and learn about self advocacy.

**APPLICANTS PERSONNEL QUALIFICATIONS QUESTIONNAIRE**  
**APPLICATION NO. ADDPC-FFY20-SACD-A1**

Instructions: **Complete a separate Personnel Qualifications Questionnaire for each person** in a key personnel position, including if hiring subcontractors. This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

**1. Name of person:** Bill Lucero

**2. Position currently held with Applicant:** Project Aide

**3. Proposed position for contract service and percentage of time devoted to the contract service:** Logistics Consultant and graph designer 30%

**4. Number of years with Applicant:** 6 years

**5. Identify the primary function(s) of this person in terms of providing services under this Contract:** Bill will work with the grant partners to provide technical support in facilitating advisory committee meetings, self advocacy group trainings, and coalition meetings. Bill will also provide closed captioning services for any videos created and ensure electronic accessibility. Bill will also provide graphic design for all materials created for the project including outreach and conference materials.

**6. Briefly describe the person's work experience, job training, formal education (Do not attach resumes):** Bill Lucero, is a member of YAC-AZ (Youth Action Council of Arizona). He is also project staff of the SABE GoVoter Project where he serves as a Technology Assistant. He uses WordPress, a specialized software program, to provide information, videos, pictures and resources on the SABE GoVoter page website and Facebook. He assisted in creating the My Technology Handbook with recorded and edited supplemental videos, and with defining the important technology words people need to understand when using technology. He supports the GoVoter Team with technology to host webinars, and training events using GoToMeeting and other pertinent project activities. He is a 2011 graduate of Central High School in Phoenix, AZ and has attended Phoenix College.

**APPLICANTS PERSONNEL QUALIFICATIONS QUESTIONNAIRE**  
**APPLICATION NO. ADDPC-FFY20-SACD-A1**

**Complete a separate Personnel Qualifications Form for each staff that will be paid from the grant or will be conducting their work as Match.** This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring, at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

1. Name of person: Priscilla Perkins
2. Position currently held with Applicant: 1 year
3. Proposed position for contract service and percentage of time devoted to the contract service: 10%
4. Number of years with Applicant: 5 years
5. Identify the primary function(s) of this person in terms of providing services under this Contract: Ms. Perkins will provide bookkeeping to support the grant activities. Her main responsibilities will include payroll, providing payment to funded self advocacy groups, and keeping track of conference expenses and paying accounts payable.
6. Briefly describe the person's work experience, job training, and formal education. (Do not attach resumes).

Ms. Perkins has years of experience working with non-profit organizations. Pris has worked with people with intellectual and developmental disabilities to teach life skills including money management and independent living. As bookkeeper for SWI, Pris oversees payroll, accounts payable and receivable, and recordkeeping. As experience, Pris has over 40 years working in bookkeeping for various businesses and organizations.

**APPLICANTS PERSONNEL QUALIFICATIONS QUESTIONNAIRE**  
**APPLICATION NO. ADDPC-FFY20-SACD-A1**

**Complete a separate Personnel Qualifications Form for each staff that will be paid from the grant or will be conducting their work as Match.** This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring, at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

1. **Name of person:** Jon Meyers
2. **Position currently held with Applicant:** N/A
3. **Proposed position for contract service and percentage of time devoted to the contract service:** Contractor/Co-Applicant – 15% of overall time over course of grant period.
4. **Number of years with Applicant:** N/A

5. **Identify the primary function(s) of this person in terms of providing services under this Contract:**

Mr. Meyers will bear primary responsibility for ensuring organization and execution of a self-advocacy conference as one of the major deliverables of this grant. He will oversee coordination of a small steering committee, comprised of self-advocates and other relevant volunteers, to provide guidance in the planning of the conference, development of its program schedule, and identification of presenters. He will also be responsible for: securing additional sponsors as well as exhibitors/vendors; outreach, marketing and advertising; event logistics; on-site event management; and post-event evaluation by attendees. All work will be done in conjunction with self-advocates and by allowing self-advocates to take the lead to the extent they are comfortable and willing to do so.

6. **Briefly describe the person's work experience, job training, and formal education. (Do not attach resumes).**

Mr. Meyers has been Executive Director of The Arc of Arizona since August 2013 and has spent more than 30 years as a non-profit executive specializing in resource development and organizational management. In his role with The Arc, he oversees state and federal public policy, advocacy, and outreach efforts supporting the civil rights and community inclusion of individuals with I/DD, including the organization's three major annual events – *Wings for Autism*, *Sprout Film Festival*, and *Autism & I/DD Resources Conference*. During his time with The Arc, the organizational has successfully advocated for passage of key pieces of legislation to benefit Arizonans with I/DD. His prior experience includes work in higher education, the arts, animal welfare and human services. He holds a Bachelor of Arts degree in Theatre Arts and History from Santa Clara University.

**APPLICANTS PERSONNEL QUALIFICATIONS QUESTIONNAIRE**  
**APPLICATION NO. ADDPC-FFY20-SACD-A1**

**Complete a separate Personnel Qualifications Form for each staff that will be paid from the grant or will be conducting their work as Match.** This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring, at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

1. Name of person: Kristi Short
2. Position currently held with Applicant: N/A
3. Proposed position for contract service and percentage of time devoted to the contract service: Contractor/Co-Applicant – 1.5% of overall time over course of grant period.
4. Number of years with Applicant: N/A
5. Identify the primary function(s) of this person in terms of providing services under this Contract:

Ms. Short will provide administrative and planning assistance to support the activities of the self-advocacy conference planning committee and will assist on-site at the conference. This will be provided as an in-kind contribution by The Arc of Arizona.

6. Briefly describe the person's work experience, job training, and formal education. (Do not attach resumes).

Ms. Short has served as Executive Assistant for The Arc of Arizona since 2007, during which time her responsibilities have included supporting the Executive Director in a wide range of planning; event coordination and execution; interface with clients, staff, vendors, state agencies, volunteers, and other outside parties; bookkeeping and clerical tasks; and human resources. She is a member of The Arc of Arizona's in-person Residential Monitoring team as well as the Care Coordination Manager, overseeing and participating in the organization's Care Management program. Currently she divides her time between The Arc of Arizona's state office and supporting the Board of Directors of The Arc of The United States. Prior to joining The Arc, Kristi held human resources positions with a major aerospace company in Southern California.



## PERSONNEL QUALIFICATIONS QUESTIONNAIRE

Complete a separate **Personnel Qualifications Questionnaire for each person** in an administrative/management or key personnel position, including contractors. This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

1. **Name of person:** Teresa Moore

2. **Position currently held with Applicant:** Contractor

3. **Proposed position for contract service and percentage of time devoted to the contract service:**  
Consultant \_\_\_\_\_ %

4. **Number of years with Applicant:** 10 years as a contractor

5. **Identify the primary function(s) of this person in terms of providing services under this Contract:**  
provide consulting services to the grant partners in developing effective strategies in creating a statewide self advocacy coalition as well as recruiting self advocates and outreach.

6. **Briefly describe the person's work experience, job training, formal education. Do not add a resume):** Teresa Moore has 25 years experience working with individuals with developmental disabilities, 19 of those years working with projects that are connected to the self advocacy movement in the United States. Ms. Moore has been employed by ABILITY360 where she started the People First of Arizona organization with a start-up grant, a Robert Woods Johnson grant team member Ms. Moore assisted in bringing the self determination movement to Arizona. (TIML) is now a grant with the Division of Developmental Disabilities. While working at Pilot Parents (now Raising Special Kids) she worked with families of transitioning youth into employment in the (AIDD) Project of National Significance First Jobs Arizona project. Also, the Governor's Council on Developmental Disabilities employed Ms. Moore to assist with forming the "Self Advocacy Coalition of Arizona", contracted with Southwest Institute and assisted local self advocacy groups to become organized with the SWI SPEAK! Project. Ms. Moore has been self employed for 20 years with Moore Advocacy Consulting as a sub-contractor in four Administration on Intellectual Developmental Disabilities (AIDD) Projects of National Significance; Project Vote! (an ongoing project), Set Yourself Free, Mobilizing for Self-Determination, My Voice, My Choice and three grants, 1) Core Indicator Project, 2) Pathways to National Service and Internationally at Cyprus at the Disability and Advocacy Bi-communal Conference 3) Planting the Seeds for the Future grant. Additionally, Ms. Moore has been a trainer, presenter, panelist or key-note around the country, in the areas of self advocacy, self determination, leadership, strategic planning and coalition building. Most recently she is the co-director of the SABE Voter Project which was called Project VOTE! and now the director of the Self Advocates Resource and Technical Assistance Center (SARTAC) where she manages partnering organizations with self advocacy resources and technical assistance to create a website. Ms. Moore also served 6 years on the national Self Advocates Becoming Empowered Board (SABE) of Directors as Vice-President major accomplishments; being a trainer on Project Leadership in Washington DC, provided national training and assisted with the development of a toolkit with Everyone Can Serve, supporting the development of the Self Advocacy Startup Toolkit as Committee Chairperson, and recorded a video in the Advocacy in Action Video, and Introduction to SABE videos. She was also a volunteer as the Chief Editor of the "RIOT" national self advocacy newsletter.

## PERSONNEL QUALIFICATIONS QUESTIONNAIRE

Complete a separate **Personnel Qualifications Questionnaire for each person** in an administrative/management or key personnel position, including contractors. This should include all of those that are directly responsible for providing services listed under the Scope of Work in a paid or unpaid position. If personnel are to be hired, provide a job description ensuring at a minimum, questions #5 and #6, with other information as deemed necessary, is provided.

1. **Name of person:** TBD from IHD/NAU and SONORAN
2. **Position currently held with Applicant:** N/A
3. **Proposed position for contract service and percentage of time devoted to the contract service:**  
Consultant \_\_\_\_\_ %
4. **Number of years with Applicant:** N/A
5. **Identify the primary function(s) of this person in terms of providing services under this Contract:**  
provide consulting services to the grant partners in developing effective strategies in creating a statewide self advocacy coalition using best practices as well as recruiting self advocacy groups.
6. **Briefly describe the person's work experience, job training, formal education. Do not add a resume):** Experience working with people with disabilities and providing materials. Must have a clear understanding of the issues and concerns people with intellectual and developmental disabilities have in Arizona and nationally. The consultant must provide researched best practices in effective strategies in working with people with disabilities, developing self advocacy skills, and creating self advocacy groups.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: APR 04 2006

Employer Identification Number:

86-1041733

DLN:

17053077742086

Contact Person:

ERIC J BERTELSEN

ID# 31323

Contact Telephone Number:

(877) 829-5500

Public Charity Status:

170(b)(1)(A)(vi)

SOUTHWEST INSTITUTE FOR FAMILIES  
AND CHILDREN WITH SPECIAL NEEDS  
5111 N SCOTTSDALE RD STE 105  
SCOTTSDALE, AZ 85250-0000

Dear Applicant:

Our letter dated September 23, 2002, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity, rather than as a private foundation, during an advance ruling period.

Based on the information you submitted, you are classified as a public charity under the Code section listed in the heading of this letter. Since your exempt status was not under consideration, you continue to be classified as an organization exempt from Federal income tax under section 501(c)(3) of the Code.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at [www.irs.gov](http://www.irs.gov).

If you have general questions about exempt organizations, please call our toll-free number shown in the heading.

Please keep this letter in your permanent records.

Sincerely yours,



Lois G. Lerner  
Director, Exempt Organizations  
Rulings and Agreements