

Request for Sole Source Contract - 02/01/2025 - 09/30/2025
Title: Leadership Development and Training for Systems Change in Arizona

Funding Agency: Arizona Developmental Disabilities Planning Council, Department of Economic Security

Contract Start Date: February 15, 2025

Contract End Date: September 30, 2025

Requested Contractor: Allan Bergman, dba High Impact Mission-Based Consulting and Training, 312 North Fiore Parkway, Vernon Hills, Illinois 60061

I. About ADDPC

The Arizona Developmental Disabilities Planning Council (ADDPC) makes funds available to fulfill its mission in accordance with the Developmental Disabilities Assistance and Bill of Rights Act (DD Act) and the Council's Five-Year State Plan. The ADDPC's major funding source is the United States Department of Health and Human Services, Administration for Community Living, Administration on Disabilities, Office of Intellectual and Developmental Disabilities. The ADDPC makes funds available primarily through competitive bids or Requests for Proposals (RFPs). A general description of the current proposal is included in this document.

The ADDPC, authorized under Public Law 106-402, the Developmental Disabilities Assistance and Bill of Rights Act, is one of 56 similar entities in each of the United States and its territories. The ADDPC is an independent agency located in the Arizona Department of Economic Security (DES). Its activities are governed by a 23-member body or Council, appointed by the Governor, and comprised of at least 60 percent people with intellectual or developmental disabilities (I/DD) and their families. Other members include policy makers representing various agencies and organizations having a vested interest in people with I/DD. The Council meets five times each year; all meetings are open to the public and are subject to Arizona Open Meetings Law.

The mission of the ADDPC is to assure individuals with I/DD and their families participate in the design of and have access to culturally competent services, supports, and other assistance and opportunities that promote independence, contribution, self-determination, integration, and inclusion in their communities. The ADDPC achieves this mission by promoting advocacy and leadership, community capacity building, and systems change activities. It also serves in an advisory capacity to the AZ Department of Economic Security and the Office of the Governor.

The ADDPC has established a detailed set of goals in its Five-Year State Plan covering federal fiscal years 2021-2026. These goals address the most pressing needs of the I/DD community as identified by stakeholders in Arizona. The goals are approved by Council members as the framework for its work within the context of the Five-Year Plan:

Goal 1 - Self-Determination: By 2026, the ADDPC will establish, strengthen, and expand advocacy among and for persons with intellectual and developmental disabilities (I/DD) so that they can live more self-determined lives, fully engaged, and included in all aspects of community life.

Goal 2 - Meaningful Careers: By 2026, the ADDPC will increase the career potential of people who have intellectual and developmental disabilities (I/DD) and link them with resources needed to achieve their career goals.

Goal 3 - Inclusion with Engagement: By 2026, the ADDPC will support communities and agencies across Arizona to increase inclusion and engagement of people of all ages and backgrounds who have intellectual and developmental disabilities (I/DD).

Goal 4 - Safety: By 2026, the ADDPC will expose and reduce instances of abuse and neglect against individuals with intellectual and developmental disabilities (I/DD) of all ages while working toward a systemic focus on prevention.

Goal 5 - System Access & Navigation: By 2026, the ADDPC will enhance, strengthen, and increase access to accurate and user-friendly information and the services needed for people with intellectual and developmental disabilities (I/DD) to lead more self-determined lives.

This request for a sole source contract falls under Goal 2 - Meaningful Careers.

II. 41-2535 Sole Source Procurement

Occasionally, the nature of a Council activity may require the service of a specialized vendor, and no RFP is issued. Such objectives may include Council-initiated activities, conferences, non-conference public events, and Council funds used as match for non-federal grant funds, among other activities. The purpose of this request is to assist the Council in determining when such non-competitive awards should be made.

The issue of sole source funding arises when a need exists for services that are available from only one subject matter expert, agency or organization. Sole source funding and R2-7-E301, provides that.

Justification

ADDPC is committed to using the services of a nationally recognized disability leader and policy expert to coordinate and facilitate a leadership development and training program for individuals with intellectual and developmental disabilities, and their family members, to help them become leaders and advocates for systems change in Arizona. Allan Bergman, CEO of High Impact Mission-Based Consulting and Training is uniquely familiar with the subject matter covered in this Leadership Development and Training program. His experience spans more than 50 years

in disability services, supports, programs, and training, and his unparalleled combination of skills and expertise is utilized by scores of prominent disability organizations across the U.S.

Mr. Bergman has worked nationally and in 44 states as system change facilitator, strategic planner, culture change/organizational/provider transformation designer, board governance consultant, group facilitator and trainer, including 35 continuous years in Partners in Policymaking. He possesses an extraordinary ability to understand and analyze complex issues and to present them and proposed solution in an articulate understandable manner to diverse audiences. He has served as the CEO of six non-profit agencies with budgets ranging from \$3.5 to \$31 million. He spent 18 years in Washington, D.C. as the Director of Government Relations & Director of State-Federal Relations for United Cerebral Palsy Associations and as the CEO of the Brain Injury Association of America. He has testified on numerous occasions before Congress and at least 20 State legislatures on many subjects. He is the only person invited to testify before both the U.S. Senate Finance Committee and the U.S. House Ways & Means Committee on the loss of health care and long-term public benefits; resulting in 1999 legislation creating the Medicaid "buy in" and the Medicare continuation for individuals who go to work as SSI and/or SSDI beneficiaries, and the Work Incentives Planning and Assistance (WIPA) program. He is an insightful and perspective strategic planner skilled at aligning goals, groups, and available resources on organizational missions. He is an inspirational trainer and has provided training to over 82,000 individuals working with over 400 organizations and government agencies in 44 states in the U.S., Israel, and Australia. He works with all levels and functions within an organization to build trust through a collaborative strategic vision and plan, with consistent messaging, open communication, and support to achieve long term goals through staff development, culture, and transformational change. During the past 12 years, he has provided consultation, training, and technical assistance in the states of NH, VT, MA, CT, NY, PA, DE, MD, VA, GA, NC, FL, AL, TN, LA, TX, KY, OH, MI, IN, WI, IL, MO, IA, OK, CO, NM, KS, MN, ID, WY, MT, SD, UT, NC, CA, OR, WA, and AK.

Mr. Bergman will assist ADDPC with content and program development, recruit and secure national Subject Matter Experts to present information; conduct and facilitate two in-person all day leadership development sessions for self-advocates and family members; coordinate, facilitate, and moderate 6 webinars; coordinate payment, document and provide accounting for Subject Matter Expert participation and presentation; secure webinar presentations and materials for distribution; follow up with self-advocates and family members on specific requests for information and assistance; create evaluation/survey forms; meet with ADDPC staff to review survey data, outputs and outcomes, prepare monthly report and other feedback from the previous webinar in order to establish a process of continuous quality improvement for subsequent sessions; prepare written report; and conduct a virtual presentation of leadership development and training outcome to the Full Council of ADDPC

Intent/Overall Objective

Every state Developmental Disabilities Planning Council addresses self-advocacy. Arizona wishes to take a deliberate step to not merely train advocates, and their family members, but to

train them for a specific purpose and require participants to make a commitment to participate in a particular initiative, project, or organization. The intent of the webinar series is to develop a competent, statewide network of passionate, trained leaders and advocates committed to making competitive employment capacity building and systems change a priority. This will be achieved by providing information, skills and training so they can be effective in promoting the value and multiple benefits to individuals with disabilities, their families, employers, society and the community of Employment First (supported, customized and self-employment) and community belonging for everyone with developmental disabilities and their families. This leadership development and training will involve national and local experts to equip participants with a comprehensive understanding of federal disability policies, best practices, essential competencies, data, finance, and the infrastructure required to ensure the success and sustainability of competitive integrated employment, as outlined in the Workforce Innovation and Opportunity Act. The program will also address misconceptions about employment, loss of benefits, and the stigma and stereotypes associated with diagnoses or test scores.

Participants chosen for the leadership development and training must attend and participate in both in-person sessions and all six virtual sessions and complete any homework assignments to receive their Certification of Leadership. Enrollment will be limited to 30 participants.

Deliverables

Schedule and Sequence of In-Person Sessions:

The proposed agenda framework for the 6-leadership training/content webinars, for 3.5 hours each, is as follows: 9:30 am – 9:40 am, Introduction & Objectives; 9:40 am – 10:50 am, Presentation; 10:50 am – 11:05 am, Break; 11:05 am – 11:15 am Respond to Questions in Chat; 11:15 am – 12:15 pm, Presentation; 12:15 pm – 12:30 pm, Additional Q&A, Announcements, and Evaluation. All sessions will be conducted on Saturdays to accommodate anyone employed or in an internship/apprenticeship.

The following sequence of topics and content is proposed for the webinars, beginning on Saturday, May 3, 2025, from 9:30 am – 12:30 pm MST. (Proposed presenters are recommended and will be secured if available; if not available, similarly knowledgeable speakers will be obtained):

1. May 3, 2025 - Charting the Life Course (an evidence-based best practice endorsed by Administration for Community Living) and Person-Centered Thinking and Person-Centered Planning
Presenters: National Association of State Directors of Development Disabilities Services staff, as co-facilitator of Community of Practice, Supporting Families Across the Lifespan.
Megan Mutti, Charting the Life Course Ambassador; Exec. Director, Family Matters (federally funded Parent-Training Information Center), Metamora, IL.
2. May 31, 2025 - Transition from School to Adult Life of Post-Secondary Education, Competitive Integrated Employment, Integrated Community Living and Belonging

Presenters: Erik Carter, Ph.D., UCEDD Director, Baylor University, AZ University-based researcher/trainer or Arizona Dept. of Education Director of Transition Services.

3. June 14, 2025 - The Basics of Supported Decision Making: It's Your Choice
Presenter: Morgan Whitlatch, Esq., Director of Supported Decision-Making Initiatives, Center for Public Representation, Washington, D.C.
Leader in Arizona, such as Jon Meyers, ADDPC Executive Director, on Arizona's new law.
4. July 12, 2025 - The Role of Assistive Technology and Devices in School, Employment and Community Living
Presenters: Marsha Threlkeld, Pivotal Consulting and Training, Cowiche, Washington
Allen Ray, Simply Home, Arden, North Carolina
Director of the Arizona Technology Access Program
5. August 9, 2025 - Building Meaningful Lives with an Integrated Meaningful Day in the Community,
Presenter: Sara Murphy, TransGen, San Francisco, CA, Representative from Arizona (TBD)
6. August 23, 2025 - Customized Employment with Fidelity,
Presenters: Allan I. Bergman, CEO, High Impact Mission-Based Consulting
Steven Hunt, Psy.D., Briggs & Associates, Roswell, GA
Representatives from AZ Rehabilitation Services Administration – Vocational Rehabilitation, and the Sonoran Center for Excellence in Disabilities

Budget

The following budget is based on conversations with a few of the proposed session experts. All expert presenters will invoice for their fee and include a 25% in-kind match reduction to produce their net fee. (For example, if their fee is \$1,600.00 for preparation/presentation, they will provide a \$400.00 in-kind match and have a net invoice for \$1200.00, for which they will receive an IRS 1099 Miscellaneous Income Statement from High Impact Mission-Based Consulting & Training in January 2026.) High Impact will invoice ADDPC monthly for actual costs for reimbursement. The budget presumes that all participants in Arizona will be providing their session on "work time" and not require a fee. If that is not the case, adjustments will be made for their compensation. The budget also presumes that the Arizona Developmental Disabilities Planning Council will be responsible for all of the logistics for the in-person sessions and webinars, including marketing; outreach; registration; sending out links for the sessions; providing "shared screen" for the presenters; arranging and paying for the services of ASL, CART and/or foreign language interpreters as needed by the registrants; sending out or providing a website for the participants to obtain the slides and any other information provided by the presenters; making copies of materials needed for the in-person sessions; working with the project director to develop, disseminate and aggregate the survey data for each session; tracking homework assignments; tracking both outputs and outcomes from the Leadership Training; and developing Certificates of Leadership to be signed by both Jon Meyers, Executive Director of ADDPC, and Allan I. Bergman, CEO, High Impact Mission-Based Consulting & Training.

A. Fees Paid to no more than eight Expert Session Presenters for preparation & webinar presentation time @ an average of \$1,600.00 each, less 25% as an in-kind match contribution, for a net cost of \$1,200.00 each, for a total of \$9,600.00	
B. Charges for Allan I. Bergman to communicate with potential presenters by phone and/or emails, both from Arizona and from out of state; negotiate content and fees, dates and delivery of materials' time; review materials and send to ADDPC's Michael Leyva; meet prior to each webinar with Michael Leyva to review details and evaluation/survey forms; and meet between webinars with Michael Leyva and/or Chair or Members of the ADDPC Meaningful Careers Committee, to review survey data, outputs and outcomes, prepare a monthly report and other feedback from the previous webinar in order to establish a process of continuous quality improvement for subsequent sessions, and provide a final written report and a 30-minute virtual report to the full membership of the ADDPC in November 2025, for a total of 60 hours @ \$200.00/hour, less 25% in-kind match contribution, for net of \$150.00/hour & a total of	\$ 9,000.00
C. Charges for A.I. Bergman to prepare for & present at the 2 in-person Sessions @ \$2,600.00/day, less 25% in-kind match, for a net of \$1,950.00/day	\$3,900.00
D. Estimated travel costs for Allan I. Bergman for two trips from Chicago to Phoenix, including transportation to and from airports, airfare, lodging, meals, etc. (No matching)	\$2,500.00
E. Charges for Allan I. Bergman both to present and to facilitate each of the six webinars in the series for a total of 24.0 hours @ \$220.00/hour, less 25% in-kind match contribution, for a net of \$165.00/hour and a net total of	\$3,960.00
F. Subtotal of Cash Expenditures:	\$28,960.00
G. Indirect/Administrative Costs @ 4.75%, less 25% in-kind match for a net of 3.56% of \$ for a net total of	<u>\$ 1,030.98</u>
TOTAL:	\$29,990.98

Additional Contractor Responsibilities

Provide ADDPC the mandatory reports (i.e., monthly, quarterly/annual programmatic reports, monthly fiscal reports for reimbursements, Initiative Information Sheet updates, and other relevant reports deemed necessary).

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