

Background:

The binder materials for the August meeting contained an Executive Summary for a Partners in Policymaking project. The Project Development Committee and the full Council discussed the Executive Summary and directed staff to provide additional information on specific items. The Executive Summary behind this tab provides the information gathered and response to Council requests. This revised Executive Summary will be presented during the Committee of the Whole.

As the Executive Summary notes, implementing Partners in Policymaking requires that TCDD follow the model as designed, although minor adaptations may be made. The Council will be voting on whether or not to implement the program as designed. If major changes that are not consistent with the model are made or a different curriculum is desired, the program will not be considered “Partners in Policymaking.”

Colleen Wieck, the creator of the program, has offered to work with the selected grantee to reduce costs if the project is implemented.

Please review the Executive Summary closely and, if you have any questions, please contact Joanna Cordry, Planning Coordinator, at (512) 437-5410 or Joanna.Cordry@tcdd.texas.gov.

<p><u>Committee of the Whole</u></p> <p><u>Agenda Item 8.</u></p>	<p><u>Expected Action:</u></p> <p>The Committee will consider the Executive Summary and may recommend Council approval for funding.</p>
<p><u>Council</u></p> <p><u>Agenda Item 9. A.</u></p>	<p><u>Expected Action:</u></p> <p>The Council will consider recommendations from the Committee.</p>

Executive Summary

Partners in Policymaking

Project Goal

Facilitate advanced leadership and advocacy training for adults with intellectual and developmental disabilities and family members of individuals with intellectual and developmental disabilities using the Partners in Policymaking curriculum.

Relationship to TCDD State Plan Goals

This project will help the Texas Council for Developmental Disabilities (TCDD) meet the following TCDD FY 2012 - 2016 State Plan Goal and Objective:

Goal 6: Work with others to double the number of identified leadership development and advocacy training programs that are able to provide culturally appropriate training for people with developmental disabilities without ongoing grant funding from TCDD, by 9/30/2016.

Objective 4: Each year of the plan, support individuals who have developmental disabilities, their family members, and their allies to improve their skills related to self-advocacy, public advocacy, and leadership.

Maximum Funding and Duration

One project, for up to five years, for the following funding amounts:

- Up to \$100,000 for the first year to prepare for the first class and develop an evaluation plan
- Up to \$225,000 for the second year to hold one class
- Up to \$250,000 for the third year to hold one class and an advanced training weekend
- Up to \$300,000 each year for the fourth and fifth years to hold two simultaneous classes and one advanced training weekend each year

These amounts represent the following approximate percentages of the TCDD grants budgets for each year, using estimates provided in August 2015 and assuming funding available for grants decreases:

- 3% for the first year
- 8% for the second year
- 9% for the third year
- 10% for the fourth and fifth year

Background

TCDD has made leadership and advocacy training a priority outlined in the five year state plan. In this goal, TCDD has identified advanced training as a priority objective. TCDD leadership and advocacy training projects have had various purposes:

- to support people to be stronger self-advocates;
- to train people to become local leaders;
- to change paradigms so people understand disability as a natural part of life and to be committed to full inclusion in all aspects of community life; and/or
- to develop advocates who will address statewide policy issues in a highly visible manner, such as advocating at the Capitol or serving on statewide councils, committees, or workgroups.

In the past, Council members have identified all four outcomes as worthwhile, and all four outcomes have been achieved through various projects. Partners in Policymaking (PIP) is one model that could be implemented to achieve these outcomes.

Partners in Policymaking (PIP), created by Colleen Wieck, Ph.D., the Executive Director of the Minnesota Developmental Disabilities Council, is a nationally recognized and branded leadership training program for people with developmental disabilities and family members. PIP provides participatory training in best practices, current issues, trends in service provision, and advocacy skills to promote citizen involvement and leadership. Graduates often assume leadership roles in a variety of community and statewide organizations following their participation in the program.

Previous TCDD Funding for Partners in Policymaking

TCDD funded PIP from 1990 to 2006 which resulted in 593 graduates. TCDD followed the original model closely which required classes attended over eight weekends, each involving at least one overnight stay; used both national and in-state presenters; and ensured that training was consistent with the Minnesota curriculum. The typical class, per the model, included approximately 33% individuals with disabilities and 66% parents of individuals with developmental disabilities.

When the program ended in 2006, the annual funding amount was \$385,000 per year. Funding covered training; participants' and presenters' travel, lodging, and meals; hotel meeting space; administrative costs; and an independent evaluation consisting of a six-month follow-up survey and a long-term follow up of graduates.

Graduate Follow-up

Response to independent surveys according to available information:

- Response rates for 6 months surveys ranged from approximately 30% to approximately 50%
- Six month survey results from 1997 showed that anywhere from 69% - 85% of respondents reported participating in advocacy activities
- Response rates for long term surveys ranged from 23% to 43%
- Most who were active were involved in local advocacy around education issues

TCDD staff also informally reviewed a list of partner graduates and identified at least 60 of 593 (10%) who are known to TCDD staff:

- Approximately 25 are known to staff to be involved in local advocacy
- Approximately 25 run or work for a disability-related organization or agency

- Approximately 27 have been actively involved in statewide advocacy
- Approximately six have been active in advocating on national issues
- Fifteen have served on the Council

TCDD funds other leadership and advocacy training programs, with other curriculum. These programs have served local or regional areas; do not require overnight stays; offer training to a greater number of people at a reduced per-person cost; and several have provided training in Spanish. The most recent projects- such as Project MOVE, implemented by the Arc of Texas; Project LEAD, implemented by Texas A&M; and Project SAVE, implemented by the Arc of Texas - each trained at least 100 people a year with funding of \$75,000 per year per project. The grantees evaluated participants' satisfaction with their training, but no long term or global external evaluation was typically done, in part due to the low funding amount. Other TCDD advocacy projects include funding for local and statewide Youth Leadership Projects and TCDD Public Policy Fellows.

There have been reports that PIP produces the largest number of advocates who are committed to testifying and serving on statewide boards, committees, and workgroups; however data from PIP cannot be compared to other leadership and advocacy training programs since similar data has not been collected across other projects. TCDD incorporated funding for long term follow-up in the PIP program which produced a list of graduate activity. TCDD has not maintained lists of graduates from other leadership and advocacy programs.

Costs of Advanced Training

Some Council members have expressed interest in funding a new PIP program at a smaller funding amount and in a way that could not only increase the number of individuals trained, but also increase the percentage of graduates who participate in statewide advocacy. TCDD staff spoke with Colleen Wieck, Ph.D., about ways to reach these goals while remaining true to the model. She provided the following observations and recommendations:

- The purpose of PIP is to change public policy, and the screening process can focus on this by selecting individuals who have demonstrated they have a commitment and willingness to engage in public advocacy and/or serving as leaders in their communities.
- TCDD may make some changes to the curriculum to support Council priorities.
- Costs may be decreased by selecting lower-cost presenters; using one presenter for most of the weekend; incorporating distance learning, Skype, or other video conferencing technologies to use a blended learning approach; holding regional classes; reducing the number of weekends; or eliminating overnight hotel stays for some or all participants. **Dr. Wieck has offered to assist the selected grantee to identify other ways to reduce costs.**
- Annual one-weekend graduate workshops provide graduates with an opportunity to re-connect, network, and get the latest information – all of which could maximize TCDD's investment.
- Charging those who can pay for participation in the program might help defray costs.

Applicant Selection

TCDD should play a strong role in the selection of participants, and participants should be selected based in part on their willingness to work with legislators and to communicate the need for policy

change to policy makers and the general public. All participants would be encouraged to maintain interaction with TCDD public policy efforts and would be included in all TCDD distribution such as emails, postings, and news.

Public Policy Impact

The TCDD Position Statements and Public Policy Priorities articulate a roadmap for system change. A TCDD PIP could educate participants about positions and priorities, and graduates would be expected to fully collaborate with other advocates in organized public policy advocacy on TCDD priorities. Graduates would also be encouraged to engage in other organizational, local government or individual public policy advocacy.

Public Awareness, Products, and Communications

TCDD benefits from individuals and organizations being aware of and providing input to TCDD. Graduates could potentially reach individuals and organizations that might not be aware of TCDD enabling more individuals to benefit from or become more active in TCDD's efforts. TCDD could also learn from PIP graduates on issues that impact individuals with developmental disabilities and their families. TCDD would reach out to PIP graduates in their public input process.

Expected Outcome, Goal, and Outputs

Outcome

People with developmental disabilities and family members will engage in advanced public policy advocacy that has a statewide impact.

Goal

At least 75% of participants who respond to follow-up contact one year after completion of PIP report they have been actively involved in public policy advocacy that impacts statewide policy.

Outputs

In the first year of this project:

- The grantee will plan the first year which will incorporate modifications to the current PIP curriculum to lower costs and include more participants. The grantee will prepare to hold a class in the second year.
- The grantee will develop objective selection criteria for use by a selection team that includes the project coordinator, TCDD representatives, and other funding source representatives.
- The grantee and TCDD will complete the outreach and selection processes.
- The grantee will develop an evaluation plan that incorporates graduates one, two, three, four, and five years after graduating.

In the second year and third years of this project:

- A diverse group of approximately 25-35 Texans who have developmental disabilities and family members of people who have developmental disabilities will complete PIP each year.
- The grantee will develop a plan to meet TCDD expectations for the fourth and fifth years.

- Beginning in the third year, one weekend of advanced training will be provided each year for graduates of the program.

In the fourth and fifth years of this project:

- The grantee will partner with another organization to hold two simultaneous classes using available technology for approximately 40-50 Texans who have developmental disabilities and family members of people who have developmental disabilities to complete PIP each year. At least one program will be held in an area of the state that has a high percentage of people who are considered underserved or unserved; this program must be culturally relevant and responsive to the needs of the people served. The regional program(s) should have local facilitators and use technology such as skype or video conferencing to connect with each other.
- The grantee will hold one weekend of advanced training each year.
- The grant will provide a final report to TCDD within 60 days of project completion (the end of the fifth year).
- TCDD will review recommendations to determine if costs can be further reduced if TCDD wishes to continue the program.

Project Description

One organization or several organizations working in collaboration will develop and implement a Texas PIP program to support individuals with developmental disabilities and family members to achieve [competencies expected of Partners in Policymaking graduates](#) (Attachment A). Graduates will develop a basic understanding of TCDD's positions and priorities; Person Centered Thinking; supported decision making and other alternatives to guardianship; disproportionality and disparities experienced by people with developmental disabilities who are of racial/ethnic minority backgrounds; and how some of the information presented may be perceived differently due to culture, background, social/political beliefs.

The grantee will develop the structure and model for their program specific to Texas using information from other state Partners in Policymaking programs.

The grantee will be responsible for meeting the goals and achieving the outputs identified above and also:

- Managing logistical issues (including, but not limited to: arrangement of hotels and meals if needed, organization of transportation and accommodations if necessary, and timely dissemination of written information).
- Assisting participants to develop solutions to barriers to attendance and/or to resolve conflicts or concerns.
- Adapting the program content as necessary and recruiting speakers.
- Ensuring inclusion and accommodations for individuals with developmental disabilities.
- Supporting networking activities.
- Evaluating each weekend and providing a report at the end of the grant project.

- Connecting graduates to TCDD; Disability Rights, TX; the University of Texas Center for Disability Studies; the Texas A&M Center on Disability and Development; other organizations or agencies that are affiliated with disability advocacy, systems change, and legislative offices.
- Encouraging and assisting graduates to apply for leadership positions on governor-appointed councils or statewide workgroups and committees.

Sustainability

TCDD set a goal for the FY 2012 – 2017 State Plan to “... double the number of identified leadership development and advocacy training programs that are able to provide culturally appropriate training for people with developmental disabilities without ongoing grant funding from TCDD...” and has tried numerous approaches to encourage sustainability of leadership development and advocacy training projects. Very few grant projects have been able to continue the program itself and provide training at the same level after their grant is completed. This includes previous Partners in Policymaking projects, including those implemented by developmental disabilities councils in other states or territories. It appears unrealistic to expect the program to become sustainable without any funding from TCDD or other partners; thus the grantee will be encouraged to bring in additional partner organizations that can contribute funding or other resources.

However, sustainability of advanced leadership and advocacy training can be realized in the long-term activity and impact of its graduates. The grantee will be expected to demonstrate how they have obtained a lasting impact by developing advocates who increase their involvement in statewide advocacy and who remain active for many years following their graduation. TCDD may evaluate the degree to which the program achieved sustainability by increasing the number of advanced leaders and advocates active in our state and use this information in future grants.

Project Evaluation

Data and evaluation collection activities will include the following and may include others:

- Demographic information to include regional and cultural variables
- Feedback from participants
- Indicators of program impact such as the
 - number of organizations and policy makers educated by graduates
 - number of materials created and disseminated to policymakers by graduates
 - number of graduates who join boards, committees, workgroups, or assume other positions of leadership
 - specific policies changed, and activities or projects undertaken by graduates

TCDD staff have gathered measurement tools developed by the Oklahoma Council, a DD Council that has presented at a national conference on the positive outcomes from their PIP program, and the Oregon DD Council. These materials include a log to record activity; and pre-and post- tests to measure change experienced by participants. In addition, TCDD could choose to engage an independent evaluator again and/or to ask applicants for the grant to propose how they would measure the impact

of their program. Last, but not least, the Council may ask or require graduates to present to the Council directly.

Other Considerations

1. The Administration on Intellectual and Developmental Disabilities (AIDD) places a high priority on achieving racial and ethnic diversity in the classes. One concern with selecting participants who will be available to travel to Austin for meetings and/or to testify at the Capitol after they have completed training is that it may limit the diversity of participants. Past PIP classes did include individuals of various races and ethnicities and provided simultaneous translation to people whose first language was not English, but the class makeup was not fully representative of the racial and ethnic diversity of a state that is now a majority minority state. However, classes did include individuals from various geographic regions of the state and individuals who had a range of income levels. It may be difficult to accomplish any of these if the selection process favors those with the resources and inclination to advocate at the Capitol or serve on statewide boards. This Executive Summary proposes that the PIP program will use technology and facilitators to develop regional classes that prepare people to advocate with their legislators when they are in their home districts. Such classes, if also culturally appropriate, could increase the racial, ethnic, and economic diversity of the individuals who benefit from PIP training. Another option would be to develop additional culturally appropriate PIP projects, perhaps in other areas of the state and perhaps implemented in other languages.
2. Dr. Wieck has stated that she will gladly work with the organization to whom the grant is awarded to help them find ways to reduce costs, and that she will not offer support to one applicant over another prior to an organization being selected to receive the grant. The Request for Proposals will state that her advice is available to everyone and that applicants should not request letters of support from her.
3. The PIP program is a nationally recognized advanced leadership and advocacy training program. A portion of the cost associated with this project is due to the agreement to implement a program that is consistent with the model, including providing training over multiple weekends and using high-quality speakers. This is necessary to be able to use the Partners in Policymaking name without diluting the value of the “brand.” Providing the necessary supports to allow participation by individuals with limited income and resources is a significant portion of the cost. These supports including funding travel and lodging for multiple weekends and providing respite if needed for a parent of a child with a developmental disability.

Appendix A

Competencies Expected of Partners in Policymaking Graduates (per the original model)

- Describe the history of services for, and perceptions of, people with developmental disabilities.
- Describe significant contributions of the parents' movement.
- Describe the history of the self-advocacy and independent living movements.
- Describe the benefits and values of a quality, inclusive education for students with and without disabilities.
- Outline specific strategies to achieve a quality, inclusive education.
- Demonstrate knowledge of the service coordination system and what services may be available.
- Describe the importance of futures-planning and self-direction for people with developmental disabilities.
- Understand the principles of choice and control of resources in futures-planning.
- Understand the reasons for and the importance of proper positioning techniques for people with physical disabilities.
- Describe examples of state-of-the-art technologies for people with significant disabilities.
- Describe the importance of supported, competitive employment opportunities.
- Understand that a flexible, responsive system of supports for the families of children with disabilities is the cornerstone for a true system of community supports for people with developmental disabilities.
- Understand the need for all individuals to experience changes in lifestyle across the lifespan.
- Know/understand the importance of home ownership/control as one of the defining characteristics of adult life in our culture.
- Understand the basic principles and strategies being used to support people with developmental disabilities in their own homes across the lifespan.
- Create a vision for the year 2020 (and beyond) for people with disabilities.
- Understand how a bill becomes a law at the state and federal levels.
- Identify critical federal issues and the process by which participants can personally address their concerns.
- Demonstrate successful techniques for advocating for services to meet the needs of unserved and underserved individuals.
- Draft and deliver testimony for legislative hearings.
- Learn how to meet a public official and discuss issues.
- Identify strategies for beginning and sustaining grassroots-level organizing.
- Understand the role of when and how to use the media to effectively promote issues.
- Demonstrate proper procedures for conducting a meeting.
- Gain a basic understanding of parliamentary procedure and serving on boards.