

Originally Processed With FOIA(s):

S

FOIA Number:

S

FOIA MARKER

**This is not a textual record. This is used as an
administrative marker by the George Bush Presidential
Library Staff.**

Record Group/Collection: Donated Historical Materials
Collection/Office of Origin: Frieden, Lex, Collection
Series: Disability Rights Organizations
Subseries:

OA/ID Number: 52058
Folder ID Number: 52058-002

Folder Title:
[ILRU - Independent Living Research Utilization Correspondence - 1991] [1]

Stack:

Row:

Section:

Shelf:

Position:

MEMORANDUM

TO: Lex Frieden, Senior Vice President

FROM: Laurie Gerken, ILRU Program

SUBJECT: Revised EEOC Budget

DATE: October 22, 1991

Pursuant to our discussion earlier this month, I went back and reviewed the budget that we submitted with our EEOC proposal for funding to do ADA training. As you had suggested, I rechecked all of the figures and took into account anticipated increases for the first budget period to be covered. Based on this review, I have prepared a new budget that reflects current expenditure estimates and salary figures that include scheduled increases.

The most substantial changes on the revised budget are in the categories of personnel and travel. The change in personnel costs can be attributed to a number of factors. First, base salaries will increase by four percent due to scheduled merit increases. Second, the salary figure for the project coordinator has been increased to reflect the true salary necessary for his acceptance of this position. Third, the services of Margaret A. Nosek will be provided at no cost to EEOC, since these services are consistent with her responsibilities under the NIDRR-funded field initiated research project which she directs.

As regards travel, we have received more current estimates of airfares. These estimates indicate that our original projections were extremely low, and we made adjustments accordingly.

The only other modification from our original budget has been a reduction on rental charges to reflect reduced FTEs.

Please feel free to call me if I can be of further assistance.

cc: Gregory Guidroz

BUDGET SUMMARY

	Year 1 Budget	Option Year 1 Budget
Personnel	\$116,377	\$ 91,686
Fringe Benefits	32,004	25,214
Travel	12,715	7,565
Equipment	2,900	-0-
Subcontract	40,000	-0-
Supplies	3,000	3,600
Other	204,735	26,142
TOTAL DIRECT	411,731	154,207
INDIRECT	80,735	31,612
TOTAL	\$492,466	\$185,819

ILRU BUDGET--YEAR 1

<u>Personnel</u>			116,377
	<u>% FTE</u>	<u>Est. Hrs</u>	
Lex Frieden Project Director	15%	312	14,352
Alan Meyer Project Coordinator	100%	2080	40,000
Laurel Richards Materials Management Director	20%	416	8,601
Quentin Smith Evaluation Specialist	15%	312	10,280
Laurie Gerken Technical Assistance Director	15%	312	6,084
Dawn Heinsohn Materials Assembly Technician/ Technical Assistance Coordination Technician	100%	2080	25,000*
Shirley Herzog Secretary	50%	1040	12,060
<u>Fringe Benefits</u> (@ 27.5%)			32,004
<u>Travel</u>			12,715
Project Director to travel to Washington, DC to attend Alternative Dispute Resolution Symposium (\$1,455 X 1 trip = \$1,455)			
PCA to accompany Project Director to symposium (\$1,190 X 1 trip = \$1,190)			
Project Coordinator to travel to 4 training sites (\$1,640 X 4 sites = \$6,560)			
Project Coordinator to travel to 2 training sites (\$1,755 X 2 sites = \$3,510)			
<u>Equipment</u>			2,900
Computer--\$1,700			
Plain paper fax machine--\$1,200			

* This is a new position and we are expecting this employee whose annual salary is now \$20,176, to be promoted into this position.

<u>Subcontract</u>	40,000
<u>Supplies</u>	3,000
Includes computer diskettes, paper, and instruments used for evaluation	
<u>Other</u>	204,735

A) Training Activities 123,278

1) Phase I--\$87,741

a) Hotel and associated costs, 5 sites for
80 trainees per site--\$53,901

Meeting rooms, 5 days @ \$600 X 5 sites--\$15,000

Breaks:

Morning coffee break, 100 people @ \$4.50
X 5 days X 5 sites--\$11,250

Afternoon soda break, 100 people @ \$2.25
X 5 days X 5 sites--\$5,625

Plus Tax & Gratuity (7% + 17%)--\$4,251

Audio Loop--2 systems @ \$267.50/day X 5 days
X 5 sites--\$13,375

Microphones--3 microphones @ \$25/day X 5 days
X 5 sites--\$1,875

Mixer--\$30/day X 5 days X 5 sites--\$750

Overhead projection--Projector and screen and
labor--\$71/day X 5 days X 5 sites--\$1,775

b) Van--Passenger: \$48/day on six-day rate--
\$48 X 6 days X 5 sites--\$1,440

c) Interpreters--5 days X 3 @ \$240 X 5 sites = \$18,000

d) Miscellaneous interpreters for 1 extra day
equivalent, \$240 X 5 sites--\$1,200

e) Mentors (for persons who are mentally retarded)
\$10/hour X 8 hrs X 5 days X 3 X 5 sites--\$6,000

f) Other hourly staff or other accommodations such as emergency attendant
care, transportation, errands, material handling, assisting registration
and training staff.

2 people X 3 days X 8 hours @ \$10/hr X 5 sites--\$2,400

2 people X 6 days X 8 hrs @ \$10/hr X 5 sites --\$4,800

2) Phase II--\$35,537

a) Hotel and associated costs, 2 sites for
50 trainees per site--\$20,625

Meeting rooms, 6 days @ \$400 X 2 sites--\$4,800

Breaks:

Morning coffee break, 60 people @ \$4.50
X 6 days X 2 sites--\$3,240

Afternoon soda break, 60 people @ \$2.25
X 6 days X 2 sites--\$1,620

Plus Tax & Gratuity (7% + 17%)--\$2,433

Audio loop--2 systems @ \$267.50/day X 6 days
X 2 sites--\$6,420

Microphones--3 microphones @ \$25/day X 6 days
X 2 sites--\$900

Mixer--\$30/day X 6 days X 2 site--\$360

Overhead projection--projector and screen and
labor--\$71/day X 6 days X 2 sites--\$852

b) Van--Passenger: \$48/day on six-day rate--
\$48 X 7 days X 2 sites--\$672

c) Interpreters--6 days X 3 @ \$240 X 2 sites--\$8,640

d) Miscellaneous interpreters for 1 extra day
equivalent--\$240 X 2 sites--\$480

e) Mentors--\$10/hr X 8 hrs X 6 days X 2 X 2 sites--\$1,920

f) Other hourly staff for other accommodations such as emergency attendant
care, transportation, errands, material handling, assisting registration
and training staff.

2 X 3 days X 8 hours @ \$10/hr X 2 sites--\$960

2 people X 7 days X 8 hrs @ \$10 X 2 sites--\$2,240

B) Telephone 6,000

Equipment--\$84/month x 12 months = \$1,008

Line charges--\$41/month x 12 months = \$492

Long distance charges--\$375 x 12 months = \$4,500

C) Postage/Shipping 5,756

1) \$2,000--includes correspondence to six
training sites, contacting agency, and
overnight mailing charges

2) \$3,756--shipping costs of training materials to 6 training sites: \$689-- (costs involved in sending 90 sets of training materials, totaling 610 lbs.) X 4 sites = \$2,756; \$500-- (costs involved in sending 50 sets of training materials, totaling 610 lbs.) X 2 sites = \$1,000

D) Printing/Reproduction--\$.147/page x 300 pages x 550 manuals	24,255
E) Office Space Rental--calculated at the rate of 220 square feet per FTE at 14 annually for 3.15 FTE	9,702
F) Filming at Training Sites--\$1,000/day x 5 days	5,000
G) Costs of Brailleing	10,744
H) Stipends (for individuals without financial sponsorship)	10,000
I) Logistical arrangements at each site	10,000
1) \$4000--to be paid to local independent living centers to coordinate logistical arrangements for 1 training site each: \$2,000--St. Louis and \$2,000--Denver	
2) \$6,000--to be paid to local independent living centers to coordinate logistical arrangements for 2 training sites each: \$3,000--San Francisco and \$3,000--Washington	

TOTAL DIRECT	411,731
INDIRECT (@ 20.5%)	80,735 *
TOTAL	492,466

*Indirect is charged against \$393,831, which is the total direct charge minus \$2,900 in the equipment category and \$15,000 of the contractual category (40,000 minus 25,000).

Year 1. Budget Justification

Personnel

Lex Frieden will serve as project director with primary responsibility for executing contractual agreements with DREDF and with the National Council on Independent Living (NCIL), which will have responsibility for specific activities of the project. He will also supervise ILRU staff involved with project activities, and will assure proper fiscal management of funding coming to ILRU for project activities. He will devote 15% of his time and effort to this project.

Alan Meyer will serve as project coordinator with primary responsibility for working with staff at DREDF and ILRU in selecting individuals for the training, handling training logistics, and follow-up activities with training participants. He will devote 100% of his time and effort to this project.

Laurel Richards will serve as materials management director with primary responsibility for oversight of project activities relating to materials preparation. She will devote 20% of her time and effort to this project.

Quentin Smith will serve as evaluation specialist with primary responsibility for developing the evaluation instruments and procedures to be used in the project. He will devote 15% of his time and effort to this project.

Laurie Gerken will serve as technical assistance director with primary responsibility for coordinating technical assistance requests related to ADA that are received at ILRU. She will devote 15% of her time and effort to this project.

Dawn Heinsohn will serve as materials assembly technician/technical assistance coordination technician with primary responsibility for word processing, assembling instructional materials, and assistance with technical assistance and follow-up activities. She will devote 100% of her time and effort to this project.

Shirley Herzog will serve as secretary with responsibility for coordinating communication between DREDF, NCIL, and training sites, and general word processing activities. Herzog will devote 50% of her time and effort to this project.

Fringe Benefits

Fringe benefits for the proposed project are requested at the current TIRR rate of 27.5% of wages and salaries.

Travel

Funds are requested for the following:

Project director to travel to Washington, DC to attend Alternate Resolution Symposium. The basis for the per trip calculation is \$1,100 airfare, \$75 per night for three nights lodging, and \$30 per day for three days of meals, \$40 miscellaneous expenses, totalling \$1,455.

Personal care assistant to accompany project director to meeting. The basis for the per trip calculation is \$1,100 airfare and \$30 per day for three days of meals, totalling \$1,190.

Project coordinator to travel to four training sites. The basis for the per trip calculation is \$900 airfare, \$75 per night for six nights lodging, \$40 per day for six days of meals, and \$50 for miscellaneous expenses, totalling \$1,640 x 4 trips = \$6,560.

Project coordinator to travel to two training sites. The basis for the per trip calculation is \$900 airfare, \$75 per night for seven nights lodging, \$40 per day for seven days of meals, \$50 for miscellaneous expenses, totalling \$1,755 x 2 trips = \$3,510.

Equipment

Two pieces of equipment will need to be secured in order to carry out the work described for ILRU staff in this proposal. An IBM compatible 386 computer with high resolution monitor will need be secured for materials preparation. The price shown for this equipment is based upon a current quotation for a machine with appropriate installed software to handle desk-top publishing and data base access and generation capabilities.

A plain paper FAX machine will also need to be purchased for this project. This equipment will allow for receipt of follow-up data and other information on project activities without requiring cutting and recopying for permanent record keeping. Acquisition of this equipment is essential if the project is to be completed with the support staff indicated in the personnel section of the budget.

Subcontract

The subcontract figure of \$40,000 has been estimated based upon 800 hours of professional staff time to assist with recruitment and selection of trainees, accessing computer networks, managing logistical arrangements at training sites, and carrying out follow-up activities with trainees-- particularly those trainees electing to use computer network capabilities for reporting progress. The hourly rate for these services is \$50, with 384 hours of effort estimated for June Kailes, who will serve as NCIL project coordinator, 48 hours of effort estimated for NCIL staff people at each of the seven training sites, and 80 hours of effort estimated for professional staff in the NCIL central office, who will assist with coordination of these efforts.

Supplies

Supply costs for this project have been estimated very conservatively based on experience in conducting projects of similar purpose and scope. The \$250 per month estimated is reasonable for a project of this scope because of the availability of funding from other sources (i.e., ILRU's field initiated research project on ADA-related services) that will cover costs of some supplies that can be used in both projects.

Other

A) Training activities--see budget for a detailed description of costs associated with this activity.

B) Telephone--\$6,000 in funds are requested to allow for the following:

Equipment = \$84/month x 12 months = \$1,008

Line Charges = \$41/month x 12 months = \$492

Long distance = \$375/month x 12 months = \$4,500

C) Postage/Shipping--in funds are requested for the following:

\$2,000--includes correspondence to six training sites, contacting agency, and overnight mailing charges.

\$3,756--shipping costs of training materials to six training sites. See budget for a detailed description of costs associated with shipping training materials.

D) Printing/Reproduction--\$24,255 in funds are requested for printing and reproduction of the training manual. The basis for this calculation is \$.147/page x 300 pages x 550 manuals = \$24,255.

E) Office space rental--\$9,702 in funds are requested to offset a pro rate portion of the direct costs incurred by ILRU in maintaining off-site (from TIRR) office facilities. The basis for calculating the rent figure is 220 square feet per FTE (3.15)--it should be noted that this square footage includes common areas and is somewhat larger than that usually used because of accommodation needs for persons in wheelchairs--times \$14 per square foot in annualized rent.

F) Filming at Training Sites--\$5,000 in funds are requested to film one of the five-day training sessions. The basis for this calculation is \$1,000 per day x 5 days of filming = \$5,000.

G) Cost of Brailling

Phase I Brailling: \$7,776

To produce in Braille a master copy of Training Manual--300 pages = approx. 1110 pages in Braille x \$.45/page = \$500

To revise Brailled master copy as needed following each training session--estimate 60 revised pages per training session 60 = 222 Brailled pages x \$.45/page = \$100 x 4 training sessions = \$400

To reproduce 40 distribution copies of the revised Brailled training manual (an estimated ten percent of trainees)--1110 pages x \$.10/page x 40 sets = \$4,400

To produce in Braille a master copy of the advanced training manual--100 pages = approx. 367 pages in Braille x \$.45/page = \$165

To reproduce 15 distribution copies of the advanced training manual (an estimated 15% of trainees)--367 x \$.10 x 15 sets = \$551

To produce Brailled copies of overhead transparencies to be used in training sessions-- \$44 x 40 sets = \$1,760

Phase II Brailleing: \$2,968

To produce in Braille a master copy of the ADA training materials developed--200 pages = approx. 667 pages in Braille x \$.45/page = \$300

To reproduce 40 distribution copies of the ADA training materials--667 x \$.10 x 40 sets = \$2,668

H) Stipends--\$10,000 in funds are requested to provide funds for individuals who are without financial sponsorship. \$500/stipend x 20 individuals = \$10,000.

I) Logistical arrangements--\$10,000 in funds are requested to pay local independent living centers to coordinate logistical arrangements for EEOC ADA training.

\$2,000-St. Louis and \$2,000-Denver--for coordinating one training site each.

\$3,000-San Francisco and \$3,000-Washington--for coordinating two training sites each

Indirect Costs

Indirect costs have been calculated at 20.5% of direct costs.

ILRU OPTION YEAR ONE BUDGET

<u>Personnel</u>	<u>% FTE</u>	<u>Est. Hrs</u>	
			91,686
Project Director Lex Frieden	10%	208	9,951
Project Coordinator Alan Meyer	50%	1,040	20,800
Materials Management Director Laurel Richards	20%	416	8,945
Technical Assistance Director Laurie Gerken	15%	312	6,327
Evaluation Specialist Quentin Smith	10%	208	7,121
Mat. Prep./Tech. Assist. Technician Dawn Heinsohn	100%	2,080	26,000
Project Secretary Shirley Herzog	50%	1,040	12,542
FRINGE BENEFITS (27.5%)			25,214
TRAVEL			7,565
One trip for Project Director to attend meeting with DREDF staff in Washington, D.C. at \$1,455			
Travel for Personal Assistant to accompany Project Director at \$1,190			
Three trips for Project Coordinator to provide on-site technical assistance at \$1,640 per trip = \$4,920			
SUPPLIES			
Estimated at \$300 per month for consumable supplies			3,600

OTHER	26,142
Trainee materials, estimated at 100 pages per trainee at \$0.147 per page for 400 trainees	5,880
Shipping of materials estimated at \$8.00 per participant for 400 participants	3,200
Brailleing of materials for an estimated 40 participants	2,968
Miscellaneous photocopying estimated at \$100 per month	1,200
Miscellaneous postage and shipping estimated at \$100 per month	1,200
Long-distance telephone costs for contacting and estimated 80 participants each month at an average charge of \$4.00 per call	3,840
Office rent calculated at the rate of 220 square feet per FTE at \$14 annually for 2.55 FTE	7,854
TOTAL DIRECT COSTS	154,207
INDIRECT COSTS AT 20.5% OF TOTAL DIRECT COSTS	31,612
TOTAL FUNDS REQUESTED FOR OPTION YEAR ONE	185,819

BUDGET SUMMARY

	Year 1 Budget	Option Year 1 Budget
Personnel	\$116,377	\$ 91,686
Fringe Benefits	32,004	25,214
Travel	12,715	7,565
Equipment	2,900	-0-
Subcontract	40,000	-0-
Supplies	3,000	3,600
Other	204,735	26,142
TOTAL DIRECT	411,731	154,207
INDIRECT	75,610	31,612
TOTAL	\$487,341	\$185,819

AGREEMENT

An Agreement is made this _____ day of _____, 1991, between The Institute for Rehabilitation and Research ("TIIR") and the (subcontractee) in accordance with the following terms and conditions:

R E C I T A L S:

WHEREAS, TIIR desires to contract for services related to the _____ conducted by the ILRU Program ("ILRU"); and

WHEREAS, (subcontractee), desires to provide _____

NOW, THEREFORE, for and in consideration of the mutual covenants herein contained, the parties enter into the following Agreement:

I. Term and Termination.

- 1.1 The term of this Agreement shall be _____ beginning on _____.
- 1.2 Either party may elect to terminate this Agreement for non-performance of any of the terms of this Agreement by giving the other party at least thirty (30) days' written notice of such termination.

II. Duties of (subcontractee). (Subcontractee) duties under this Agreement shall be:

- 2.1 To assign the following qualified, experienced staff to perform the tasks specified in this section and supervise the delivery of any other required services:

a. _____

b. _____

c. _____

- 2.2 To conduct the following activities:

a. _____

b. _____

c. _____

III. Compensation.

- 3.1 For _____ services described above,

(subcontractee) shall be paid the sum of _____ for the term of this agreement.

3.2 On the first working day of each month, (subcontractee) will submit an invoice to ILRU for payment. ILRU will pay (subcontractee) within fifteen (15) days of receipt of the invoice.

3.3 Compensation for services paid to (subcontractee) shall be restricted to research grant funds.

IV. Independent Contractor. TIRR hereby appoints (subcontractee), and (subcontractee) accepts such appointment as an independent contractor to TIRR to provide the services described above. It is mutually understood and agreed that (subcontractee) is not an employee, agent or partner of TIRR and neither party shall have any authority to bind the other in any respect.

V. Documents. All records, files, drawings, documents, equipment and the like relating to TIRR or its patients shall be and remain the sole property of TIRR. (Subcontractee), on the termination of this Agreement, shall immediately return to TIRR all such items.

VI. Miscellaneous.

6.1 This Agreement shall be governed in accordance with the laws of the State of Texas.

6.2 (Subcontractee) agrees to indemnify and hold TIRR harmless from any and all injury, loss, damage, claims and expenses whatsoever (including attorney fees, judgements, fines and settlements reasonably incurred) caused by the negligence of (subcontractee).

6.3 This Agreement cannot be assigned by (subcontractee) without the prior written consent of TIRR.

6.4 No modification, amendment or waiver of this Agreement or any provisions hereof shall be binding upon TIRR or (subcontractee) unless in writing and signed by both parties.

6.5 This Agreement shall constitute the entire agreement and understanding between TIRR and (subcontractee) and shall supersede and replace all prior and contemporaneous agreements and understandings, written or oral.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the date above first written.

(Subcontractee):

By: _____

Date: _____

TIRR:

Date: _____

By: _____
Louisa Adelung
Executive Vice President and
Chief Operating Officer

ILRU:

Date: _____

By: _____

MEMORANDUM

TO: Alex Frieden, Senior Vice President
FROM: Laurie Gerken, ILRU Program
SUBJECT: Revised EEOC Budget
DATE: October 22, 1991

Pursuant to our discussion earlier this month, I went back and reviewed the budget that we submitted with our EEOC proposal for funding to do ADA training. As you had suggested, I rechecked all of the figures and took into account anticipated increases for the first budget period to be covered. Based on this review, I have prepared a new budget that reflects current expenditure estimates and salary figures that include scheduled increases.

The most substantial changes on the revised budget are in the categories of personnel and travel. The change in personnel costs can be attributed to a number of factors. First, base salaries will increase by four percent due to scheduled merit increases. Second, the salary figure for the project coordinator has been increased to reflect the true salary necessary for his acceptance of this position. Third, the services of Margaret A. Nosek will be provided at no cost to EEOC, since these services are consistent with her responsibilities under the NIDRR-funded field initiated research project which she directs.

As regards travel, we have received more current estimates of airfares. These estimates indicate that our original projections were extremely low, and we made adjustments accordingly.

The only other modification from our original budget has been a reduction on rental charges to reflect reduced FTEs.

Please feel free to call me if I can be of further assistance.

cc: Gregory Guidroz

ILRU BUDGET--YEAR 1

<u>Personnel</u>			116,377
	<u>% FTE</u>	<u>Est. Hrs</u>	
Iax Frieden Project Director	15%	312	14,352
Alan Meyer Project Coordinator	100%	2080	40,000
Laurel Richards Materials Management Director	20%	416	8,601
Quentin Smith Evaluation Specialist	15%	312	10,280
Laurie Gerken Technical Assistance Director	15%	312	6,084
Dawn Heinsohn Materials Assembly Technician/ Technical Assistance Coordination Technician	100%	2080	25,000*
Shirley Herzog, Secretary	50%	1040	12,060
<u>Fringe Benefits</u> (@ 27.5%)			32,004
<u>Travel</u>			12,715
Project Director to travel to Washington, DC to attend Alternative Dispute Resolution Symposium (\$1,455 X 1 trip ~ \$1,455)			
PGA to accompany Project Director to symposium (\$1,190 X 1 trip - \$1,190)			
Project Coordinator to travel to 4 training sites (\$1,640 X 4 sites - \$6,560)			
Project Coordinator to travel to 2 training sites (\$1,755 X 2 sites - \$3,510)			
<u>Equipment</u>			2,900
Computer- \$1,700			
Plain paper fax machine - \$1,200			

* This is a new position and we are expecting this employee whose annual salary is now \$20,176, to be promoted into this position.

<u>Subcontract</u>	40,000
<u>Supplies</u>	3,000
Includes computer diskettes, paper, and instruments used for evaluation	
<u>Other</u>	204,735
A) Training Activities	123,278

1) Phase 1--\$87,741

a) Hotel and associated costs, 5 sites for
80 trainees per site--\$53,901

Meeting rooms, 5 days @ \$600 X 5 sites--\$15,000

Breaks:

Morning coffee break, 100 people @ \$4.50
X 5 days X 5 sites--\$11,250

Afternoon soda break, 100 people @ \$2.25
X 5 days X 5 sites--\$5,625

Plus Tax & Gratuity (7% + 17%)--\$4,251

Audio Loop--2 systems @ \$267.50/day X 5 days
X 5 sites--\$13,375

Microphones--3 microphones @ \$25/day X 5 days
X 5 sites--\$1,875

Mixer--\$30/day X 5 days X 5 sites--\$750

Overhead projection--Projector and screen and
labor--\$71/day X 5 days X 5 sites--\$1,775

b) Van--Passenger: \$48/day on six-day rate--
\$48 X 6 days X 5 sites--\$1,440

c) Interpreters--5 days X 3 @ \$240 X 5 sites = \$18,000

d) Miscellaneous interpreters for 1 extra day
equivalent, \$240 X 5 sites--\$1,200

e) Mentors (for persons who are mentally retarded)
\$10/hour X 8 hrs X 5 days X 3 X 5 sites--\$6,000

f) Other hourly staff or other accommodations such as emergency attendant
care, transportation, errands, material handling, assisting registration
and training staff.

2 people X 3 days X 8 hours @ \$10/hr X 5 sites--\$2,400

2 people X 6 days X 8 hrs @ \$10/hr X 5 sites --\$4,800

2) Phase II--\$35,537

a) Hotel and associated costs, 2 sites for
50 trainees per site--\$20,625

Meeting rooms, 6 days @ \$400 X 2 sites--\$4,800

Breaks:

Morning coffee break, 60 people @ \$4.50
X 6 days X 2 sites--\$3,240

Afternoon soda break, 60 people @ \$2.25
X 6 days X 2 sites--\$1,620

Plus Tax & Gratuity (7% + 17%)--\$2,433

Audio loop--2 systems @ \$267.50/day X 6 days
X 2 sites--\$6,420

Microphones--3 microphones @ \$25/day X 6 days
X 2 sites--\$900

Mixer--\$30/day X 6 days X 2 sites--\$360

Overhead projection--projector and screen and
labor--\$71/day X 6 days X 2 sites--\$852

b) Van--Passenger: \$48/day on six-day rate--
\$48 X 7 days X 2 sites--\$672

c) Interpreters--6 days X 3 @ \$240 X 2 sites--\$8,640

d) Miscellaneous interpreters for 1 extra day
equivalent--\$240 X 2 sites--\$480

e) Mentors--\$10/hr X 8 hrs X 6 days X 2 X 2 sites--\$1,920

f) Other hourly staff for other accommodations such as emergency attendant
care, transportation, errands, material handling, assisting registration
and training staff.

2 X 3 days X 8 hours @ \$10/hr X 2 sites--\$960

2 people X 7 days X 8 hrs @ \$10 X 2 sites--\$2,240

B) Telephone

6,000

Equipment--\$84/month x 12 months = \$1,008

Line charges--\$41/month x 12 months = \$492

Long distance charges--\$375 x 12 months = \$4,500

C) Postage/Shipping

5,756

1) \$2,000--includes correspondence to six
training sites, contacting agency, and
overnight mailing charges

2) \$3,756--shipping costs of training materials to 6 training sites: \$689-- (costs involved in sending 90 sets of training materials, totaling 610 lbs.) X 4 sites = \$2,756; \$500-- (costs involved in sending 50 sets of training materials, totaling 610 lbs.) X 2 sites = \$1,000

D) Printing/Reproduction--\$.147/page x 300 pages x 550 manuals	24,255
E) Office Space Rental--calculated at the rate of 220 square feet per FTE at 14 annually for 3.15 FTE	9,702
F) Filming at Training Sites--\$1,000/day x 5 days	5,000
G) Costs of Brailleing	10,744
H) Stipends (for individuals without financial sponsorship)	10,000
I) Logistical arrangements at each site	10,000
1) \$4000--to be paid to local independent living centers to coordinate logistical arrangements for 1 training site each: \$2,000--St. Louis and \$2,000--Denver	
2) \$6,000--to be paid to local independent living centers to coordinate logistical arrangements for 2 training sites each: \$3,000--San Francisco and \$3,000--Washington	

TOTAL DIRECT	411,731
INDIRECT (@ 20.5%)	75,610 *
TOTAL	487,341

*Indirect is charged against \$368,831, which is the total direct charge minus \$2,900 in the equipment category and \$40,000 in the contractual category.

Year 1 Budget Justification

Personnel

Lex Frieden will serve as project director with primary responsibility for executing contractual agreements with DREDF and with the National Council on Independent Living (NCIL), which will have responsibility for specific activities of the project. He will also supervise ILRU staff involved with project activities, and will assure proper fiscal management of funding coming to ILRU for project activities. He will devote 15% of his time and effort to this project.

Alan Meyer will serve as project coordinator with primary responsibility for working with staff at DREDF and ILRU in selecting individuals for the training, handling training logistics, and follow-up activities with training participants. He will devote 100% of his time and effort to this project.

Laurel Richards will serve as materials management director with primary responsibility for oversight of project activities relating to materials preparation. She will devote 20% of her time and effort to this project.

Quentin Smith will serve as evaluation specialist with primary responsibility for developing the evaluation instruments and procedures to be used in the project. He will devote 15% of his time and effort to this project.

Laurie Gerken will serve as technical assistance director with primary responsibility for coordinating technical assistance requests related to ADA that are received at ILRU. She will devote 15% of her time and effort to this project.

Dawn Heinsolm will serve as materials assembly technician/technical assistance coordination technician with primary responsibility for word processing, assembling instructional materials, and assistance with technical assistance and follow-up activities. She will devote 100% of her time and effort to this project.

Shirley Herzog will serve as secretary with responsibility for coordinating communication between DREDF, NCIL, and training sites, and general word processing activities. Herzog will devote 50% of her time and effort to this project.

Fringe Benefits

Fringe benefits for the proposed project are requested at the current TIRR rate of 27.5% of wages and salaries.

Travel

Funds are requested for the following:

Project director to travel to Washington, DC to attend Alternate Resolution Symposium. The basis for the per trip calculation is \$1,100 airfare, \$75 per night for three nights lodging, and \$30 per day for three days of meals, \$40 miscellaneous expenses, totalling \$1,455.

Personal care assistant to accompany project director to meeting. The basis for the per trip calculation is \$1,100 airfare and \$30 per day for three days of meals, totalling \$1,190.

Project coordinator to travel to four training sites. The basis for the per trip calculation is \$900 airfare, \$75 per night for six nights lodging, \$40 per day for six days of meals, and \$50 for miscellaneous expenses, totalling \$1,640 x 4 trips = \$6,560.

Project coordinator to travel to two training sites. The basis for the per trip calculation is \$900 airfare, \$75 per night for seven nights lodging, \$40 per day for seven days of meals, \$50 for miscellaneous expenses, totalling \$1,755 x 2 trips = \$3,510.

Equipment

Two pieces of equipment will need to be secured in order to carry out the work described for ILRU staff in this proposal. An IBM compatible 386 computer with high resolution monitor will need be secured for materials preparation. The price shown for this equipment is based upon a current quotation for a machine with appropriate installed software to handle desk-top publishing and data base access and generation capabilities.

A plain paper FAX machine will also need to be purchased for this project. This equipment will allow for receipt of follow-up data and other information on project activities without requiring cutting and recopying for permanent record keeping. Acquisition of this equipment is essential if the project is to be completed with the support staff indicated in the personnel section of the budget.

Subcontract

The subcontract figure of \$40,000 has been estimated based upon 800 hours of professional staff time to assist with recruitment and selection of trainees, accessing computer networks, managing logistical arrangements at training sites, and carrying out follow-up activities with trainees-- particularly those trainees electing to use computer network capabilities for reporting progress. The hourly rate for these services is \$50, with 384 hours of effort estimated for June Kailes, who will serve as NCIL project coordinator, 48 hours of effort estimated for NCIL staff people at each of the seven training sites, and 80 hours of effort estimated for professional staff in the NCIL central office, who will assist with coordination of these efforts.

Supplies

Supply costs for this project have been estimated very conservatively based on experience in conducting projects of similar purpose and scope. The \$250 per month estimated is reasonable for a project of this scope because of the availability of funding from other sources (i.e., ILRU's field initiated research project on ADA-related services) that will cover costs of some supplies that can be used in both projects.

Other

A) Training activities--see budget for a detailed description of costs associated with this activity.

B) Telephone--\$6,000 in funds are requested to allow for the following:

Equipment = \$84/month x 12 months = \$1,008
 Line Charges = \$41/month x 12 months = \$492
 Long distance = \$375/month x 12 months = \$4,500

C) Postage/Shipping--in funds are requested for the following:

\$2,000--includes correspondence to six training sites, contacting agency, and overnight mailing charges.

\$3,756--shipping costs of training materials to six training sites. See budget for a detailed description of costs associated with shipping training materials.

D) Printing/Reproduction--\$24,255 in funds are requested for printing and reproduction of the training manual. The basis for this calculation is \$.147/page x 300 pages x 550 manuals = \$24,255.

E) Office space rental--\$9,702 in funds are requested to offset a pro rate portion of the direct costs incurred by ILRU in maintaining off-site (from TIRR) office facilities. The basis for calculating the rent figure is 220 square feet per FTE (3.15)--it should be noted that this square footage includes common areas and is somewhat larger than that usually used because of accommodation needs for persons in wheelchairs--times \$14 per square foot in annualized rent.

F) Filming at Training Sites--\$5,000 in funds are requested to film one of the five-day training sessions. The basis for this calculation is \$1,000 per day x 5 days of filming = \$5,000.

G) Cost of Braille

Phase 1 Braille: \$7,776

To produce in Braille a master copy of Training Manual--300 pages = approx. 1110 pages in Braille x \$.45/page = \$500

To revise Brailled master copy as needed following each training session--estimate 60 revised pages per training session 60 = 222 Brailled pages x \$.45/page = \$100 x 4 training sessions = \$400

To reproduce 40 distribution copies of the revised Brailled training manual (an estimated ten percent of trainees)--1110 pages x \$.10/page x 40 sets = \$4,400

To produce in Braille a master copy of the advanced training manual--100 pages = approx. 367 pages in Braille x \$.45/page = \$165

To reproduce 15 distribution copies of the advanced training manual (an estimated 15% of trainees)--367 x \$.10 x 15 sets = \$551

To produce Brailled copies of overhead transparencies to be used in training sessions-- \$44 x 40 sets = \$1,760

Phase II Brailling: \$2,968

To produce in Braille a master copy of the ADA training materials developed--200 pages = approx. 667 pages in Braille x \$.45/page = \$300

To reproduce 40 distribution copies of the ADA training materials--667 x \$.10 x 40 sets = \$2,668

H) Stipends--\$10,000 in funds are requested to provide funds for individuals who are without financial sponsorship. \$500/stipend x 20 individuals = \$10,000.

I) Logistical arrangements--\$10,000 in funds are requested to pay local independent living centers to coordinate logistical arrangements for EEOC ADA training.

\$2,000-St. Louis and \$2,000-Denver--for coordinating one training site each.

\$3,000-San Francisco and \$3,000-Washington--for coordinating two training sites each

Indirect Costs

Indirect costs have been calculated at 20.5% of direct costs.

ILRU OPTION YEAR ONE BUDGETPersonnel

91,686

	<u>% FTE</u>	<u>Est. Hrs</u>	
Project Director Lex Frieden	10%	208	9,951
Project Coordinator Alan Meyer	50%	1,040	20,800
Materials Management Director Laurel Richards	20%	416	8,945
Technical Assistance Director Laurie Gerkon	15%	312	6,327
Evaluation Specialist Quentin Smith	10%	208	7,121
Mat. Prep./Tech. Assist. Technician Dawn Heinsohn	100%	2,080	26,000
Project Secretary Shirley Harzog	50%	1,040	12,542

FRINGE BENEFITS (27.5%)

25,214

TRAVEL

7,565

One trip for Project Director to attend meeting with DREDF staff in Washington, D.C. at \$1,455

Travel for Personal Assistant to accompany Project Director at \$1,190

Three trips for Project Coordinator to provide on-site technical assistance at \$1,640 per trip - \$4,920

SUPPLIES

Estimated at \$300 per month for consumable supplies

3,600

OTHER		26,142
Trainee materials, estimated at 100 pages per trainee at \$0.14/ per page for 400 trainees	5,880	
Shipping of materials estimated at \$8.00 per participant for 400 participants	3,200	
Brailleing of materials for an estimated 40 participants	2,968	
Miscellaneous photocopying estimated at \$100 per month	1,200	
Miscellaneous postage and shipping estimated at \$100 per month	1,200	
Long-distance telephone costs for contacting and estimated 80 participants each month at an average charge of \$4.00 per call	3,840	
Office rent calculated at the rate of 220 square feet per FTE at \$14 annually for 2.55 FTE	1,854	
TOTAL DIRECT COSTS		154,207
INDIRECT COSTS AT 20.5% OF TOTAL DIRECT COSTS		31,612
TOTAL FUNDS REQUESTED FOR OPTION YEAR ONE		185,819



Copy for [unclear]

August 19, 1991

James Gleich, Executive Director
Disability Rights Education and
Defense Fund
2212 Sixth Street
Berkeley, California 94710

Dear Mr. Gleich:

I am pleased to provide this letter of agreement stipulating ILRU's and TIRR's willingness to enter into a collaborative relationship with DREDF for the purpose of providing training and technical assistance to facilitate effective implementation of ADA. As we had agreed, TIRR has submitted its cost proposal to EEOC, along with a technical proposal that duplicates the one submitted by DREDF. We at ILRU are quite confident that the technical proposal which both organizations has submitted is very sound and that it addresses key elements identified in EEOC's request for applications through a strong program of training and technical assistance to people with disabilities.

It is my firm belief that the DREDF/ILRU partnership, strengthened by the expertise available from the other partners identified in our proposals to EEOC, offers the very best opportunity for carrying out activities that offer a high likelihood for success in making the promise of ADA a reality in terms of benefit to people with disabilities. DREDF and ILRU truly understand the meaning of empowerment of people with disabilities and reflect this understanding in all aspects of management and service delivery. We also have a true appreciation of the importance of taking the steps needed to make training and technical assistance accessible to people regardless of disability type, and of the need to commit the resources necessary to assure optimal accessibility in training, technical assistance, and other programs that we offer.

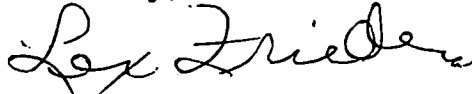
We look forward to working with you and the other fine people whose cooperation DREDF has secured to carry out this important work. We also know that leaders of the National Council on Independent Living (NCIL), which will be responsible for a number of important support activities that we will be overseeing through our portion of the project, look forward to their involvement in the proposed project.

Let me take this opportunity to say how much we have enjoyed working with DREDF in pulling together what we feel is very strong application under a very tight time schedule. Funding applications are always difficult to prepare, but they are particularly difficult when the projects are as complex as the one requested by EEOC, and the time for securing commitments and preparing the application is so short.

James Gleich
August 19, 1992
Page Two

Please let me know if we can do anything to assist further in preparing for the proposed work. I would like to offer you the very best wishes in your recently assumed role as executive director at DREDF.

Sincerely,

A handwritten signature in cursive script that reads "Lex Frieden". The signature is written in dark ink and is positioned above the printed name and title.

Lex Frieden
TIRR Senior Vice President

CONTRACT PRICING PROPOSAL COVER SHEET

1. SOLICITATION/CONTRACT/MODIFICATION NO. RFP-91-42 FORM APPROVED OMB NO. 9000-0013

NOTE: This form is used in contract actions if submission of cost or pricing data is required. (See FAR 15.804-6(b))

2. NAME AND ADDRESS OF OFFEROR (Include ZIP Code)

ILRU/TIRR
1333 Moursund Avenue
Houston, Texas 77030

3A. NAME AND TITLE OF OFFEROR'S POINT OF CONTACT Lex Frieden, Sr. Vice Pres. 3B. TELEPHONE NO. 713-797-5283

4. TYPE OF CONTRACT ACTION (Check)

☒ A. NEW CONTRACT ☐ D. LETTER CONTRACT
☐ B. CHANGE ORDER ☐ E. UNPRICED ORDER
☐ C. PRICE REVISION/ REDETERMINATION ☐ F. OTHER (Specify)

5. TYPE OF CONTRACT (Check)

☐ FFP ☐ CPFF ☐ CPIF ☐ CPAF
☐ FPI ☐ OTHER (Specify)

6. PROPOSED COST (A+B+C)
A. COST \$ 653,019 B. PROFIT/FEE \$ 0 C. TOTAL \$ 653,019

7. PLACE(S) AND PERIOD(S) OF PERFORMANCE

10/1/91-9/30/93 Houston, Texas; Washington, D.C.; San Francisco, CA; Denver, CO; and St. Louis, MO (other sites to be named)

8. List and reference the identification, quantity and total price proposed for each contract line item. A line item cost breakdown supporting this record is required unless otherwise specified by the Contracting Officer. (Continue on reverse, and then on plain paper, if necessary. Use same headings.)

A. LINE ITEM NO.	B. IDENTIFICATION	C. QUANTITY	D. TOTAL PRICE	E. REF.
	See attached budget detail for line item expenses			

9. PROVIDE NAME, ADDRESS, AND TELEPHONE NUMBER FOR THE FOLLOWING (If available)

A. CONTRACT ADMINISTRATION OFFICE

Lex Frieden, Senior Vice President
The Institute for Rehab. & Research
1333 Moursund Avenue
Houston, Texas 77030 713-797-5283

B. AUDIT OFFICE

Business Office
The Institute for Rehab. & Research
1333 Moursund Avenue
Houston, Texas 77030 713-799-5064

10. WILL YOU REQUIRE THE USE OF ANY GOVERNMENT PROPERTY IN THE PERFORMANCE OF THIS WORK? (If "Yes," identify)

☐ YES ☒ NO

11A. DO YOU REQUIRE GOVERNMENT CONTRACT FINANCING TO PERFORM THIS PROPOSED CONTRACT? (If "Yes," explain item 11B)

☐ YES ☒ NO

11B. TYPE OF FINANCING (If one)

☒ ADVANCE PAYMENTS ☐ PROGRESS PAYMENTS
☐ GUARANTEED LOANS

12. HAVE YOU BEEN AWARDED ANY CONTRACTS OR SUBCONTRACTS FOR THE SAME OR SIMILAR ITEMS WITHIN THE PAST 3 YEARS? (If "Yes," identify item(s), customer(s) and contract number(s))

☐ YES ☒ NO

13. IS THIS PROPOSAL CONSISTENT WITH YOUR ESTABLISHED ESTIMATING AND ACCOUNTING PRACTICES AND PROCEDURES AND FAR PART 31 COST PRINCIPLES? (If "No," explain)

☒ YES ☐ NO

14. COST ACCOUNTING STANDARDS BOARD (CASB) DATA (Public Law 91-379 as amended and FAR PART 30)

A. WILL THIS CONTRACT ACTION BE SUBJECT TO CASB REGULATIONS? (If "No," explain in proposal)

☐ YES ☒ NO

B. HAVE YOU SUBMITTED A CASB DISCLOSURE STATEMENT (CASB DS-1 or 3)? (If "Yes," specify in proposal the office to which submitted and if determined to be adequate)

☐ YES ☒ NO

C. HAVE YOU BEEN NOTIFIED THAT YOU ARE OR MAY BE IN NON-COMPLIANCE WITH YOUR DISCLOSURE STATEMENT OR COST ACCOUNTING STANDARDS? (If "Yes," explain in proposal)

☐ YES ☒ NO

D. IS ANY ASPECT OF THIS PROPOSAL INCONSISTENT WITH YOUR DISCLOSED PRACTICES OR APPLICABLE COST ACCOUNTING STANDARDS? (If "Yes," explain in proposal)

☐ YES ☒ NO

This proposal is submitted in response to the RFP, contract, modification, etc. in item 1 and reflects our best estimates and/or actual costs as of this date and conforms with the instructions in FAR 15.804-6(b) (2), Table 15-2. By submitting this proposal, the offeror, if selected for negotiation, grants the contracting officer or an authorized representative the right to examine, at any time before award, those books, records, documents and other types of factual information, regardless of form or whether such supporting information is specifically referenced or included in the proposal as the basis for pricing, that will permit an adequate evaluation of the proposed price.

15. NAME AND TITLE (Type)

Louisa Adelung
Executive Vice President and COO

16. NAME OF FIRM

The Institute for Rehabilitation and Research

17. SIGNATURE

Louisa Adelung

18. DATE OF SUBMISSION

8/19/91

NSN 7540-01-142-8045

U.S. GPO: 1988-201-760/80174

ATTACHMENT I

STANDARD FORM 1411 (REV. 7-87)
Prescribed by GSA
FAR 101.11-6.101, 101.11-6.102

NOT APPLICABLE

CLAIM FOR EXEMPTION FROM SUBMISSION OF CERTIFIED COST OR PRICING DATA		FORM APPROVED GPO NO. 3090-0118
1. OFFEROR (Name, address, ZIP Code)		2. SOLICITATION NO.
3. SITUATION(S) AND LOCATION(S) WHERE WORK IS TO BE PERFORMED		4. ITEM OF SUPPLIES AND/OR SERVICES TO BE FURNISHED
5. QUANTITY		6. TOTAL AMOUNT REQUESTED FOR ITEM

By submission of this form the offeror claims exemption from requirement for submitting certified cost or pricing data on the basis that the price offered is based on an established catalog or market price of a commercial item and an additional exemption to the general public of a price set by law or regulation (see FAR 15.504-3). Complete Section I, II, or III below as applicable.

SECTION I - CATALOG PRICE (See instructions for item 7 on reverse)

7. CATALOG IDENTIFICATION AND DATE		8. SALES PERIOD COVERED FROM _____ TO _____
9. CATEGORIES OF SALES	TOTAL UNITS SOLD	10. REMARKS
a. U.S. Government only		
b. Sales of surplus to general public		
c. Other sales to general public		

If your accounting system does not provide precise information, insert your best estimate and explain the basis for it in item 10. REMARKS. Continue on a separate sheet, if necessary.

11. LIST THREE SALES OF THE ITEM OFFERED

SALES CATEGORY	DATE	NO. OF UNITS SOLD	PRICE/UNIT
a. ☐ b. ☐ c. ☐			\$
b. ☐ b. ☐ c. ☐			\$
c. ☐ b. ☐ c. ☐			\$

SECTION II - MARKET PRICE (See instructions for item 12 on reverse)

12. LIST FOUR THE SOURCE AND DATE OF PERIOD OF THE MARKET QUOTATION OR OTHER BASIS FOR MARKET PRICE, THE BASE AMOUNT, AND APPLICABLE DISCOUNTS.

NOT APPLICABLE

SECTION III - LAW OR REGULATION (See instructions for item 13 on reverse)

13. IDENTIFY THE LAW OR REGULATION ESTABLISHING THE PRICE OFFERED

REPRESENTATION (See instructions for item 14 on reverse)

The offeror represents that all statements made above and on attachments submitted are accurate and are submitted for the purpose of obtaining exemption from requirements for submitting certified cost or pricing data. The offeror also represents that, except as stated in an attachment, a bid claim for exemption establishing the price of a substantially similar item has not been denied by a Government Contracting Office or within the last 2 years. Falsely claiming exemption of the price established by the submission and, if the process of a modification of it is accepted by the Government, until the expiration of 2 years from the date of that payment under a contract resulting from the process, the Contracting Officer or any other authorized employee of the United States Government is entitled to recover in damages, costs, attorneys' fees, and other appropriate costs that may result from the claim.

14. TYPE, NAME, TITLE, AND FIRM	15. SIGNATURE	16. DATE OF SUBMISSION
---------------------------------	---------------	------------------------

GPO: 7540-01-542-0046
5010-101

STANDARD FORM 5412 (10-67)
Prescribed by GSA
FAR (48 CFR) 15.510-6(b)

ATTACHMENT III

DISCLOSURE OF LOBBYING ACTIVITIES

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure.)

Approved by OMB
0348-0046

ATTACHMENT IV

1. Type of Federal Action: ☒ a. contract ☐ b. grant ☐ c. cooperative agreement ☐ d. loan ☐ e. loan guarantee ☐ f. loan insurance		2. Status of Federal Action: ☒ a. bid/offer/application ☐ b. initial award ☐ c. post-award		3. Report Type: ☐ a. initial filing ☐ b. material change For Material Change Only: year _____ quarter _____ date of last report _____	
4. Name and Address of Reporting Entity: ☒ Prime ☐ Subawardee Tier _____, if known: ILRU The Institute for Rehabilitation and Research 1333 Moursund Avenue Houston, Texas 77030 Congressional District, if known: _____			5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime: Congressional District, if known: _____		
6. Federal Department/Agency: Equal Employment Opportunity Commission EEOC			7. Federal Program Name/Description: RFP 91-42 CFDA Number, if applicable: _____		
8. Federal Action Number, if known:			9. Award Amount, if known: \$ _____		
10. a. Name and Address of Lobbying Entity (if individual, last name, first name, MI): n/a			b. Individuals Performing Services (including address if different from No. 10a) (last name, first name, MI): n/a		
(attach Continuation Sheet(s) SF-LLL-A, if necessary)					
11. Amount of Payment (check all that apply): \$ _____ n/a _____ ☐ actual ☐ planned			13. Type of Payment (check all that apply): ☐ a. retainer n/a ☐ b. one-time fee ☐ c. commission ☐ d. contingent fee ☐ e. deferred ☐ f. other, specify: _____		
12. Form of Payment (check all that apply): ☐ a. cash ☐ b. in-kind; specify: nature _____ value _____					
14. Brief Description of Services Performed or to be Performed and Date(s) of Service, including officer(s), employee(s), or Member(s) contacted, for Payment indicated in Item 11: n/a					
(attach Continuation Sheet(s) SF-LLL-A, if necessary)					
15. Continuation Sheet(s) SF-LLL-A attached: ☐ Yes ☒ No					
16. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the law above when the transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress continuously and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.			Signature: <u>Louisa Adelung</u> Print Name: <u>Louisa Adelung</u> Title: <u>Executive Vice President & COO</u> Telephone No.: <u>713-797-5280</u> Date: <u>8/19/91</u>		
Federal Use Only: _____ Authorized for Local Reproduction Standard Form - LLL					

**DISCLOSURE OF LOBBYING ACTIVITIES
CONTINUATION SHEET**

Approved by OMA
0348-0046

Reporting Entity: _____

Page _____ of _____

N/A

PART IV - REPRESENTATIONS AND INSTRUCTIONS

SECTION K - REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS - COST PLUS FIXED FEE COMPLETION TYPE CONTRACT

K-1 52.203-4 CONTINGENT FEE REPRESENTATION AND AGREEMENT (APR 1984)

(a) Representation. The offeror represents that, except for full-time bona fide employees working solely for the offeror, the offeror--

[Note: The offeror must check the appropriate boxes. For interpretation of the representation, including the term "bona fide employee," see Subpart 3.4 of the Federal Acquisition Regulation.]

(1) ☐ has, ☒ has not employed or retained any person or company to solicit or obtain this contract; and

(2) ☐ has, ☒ has not paid or agreed to pay to any person or company employed or retained to solicit or obtain this contract any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of this contract.

(b) Agreement. The offeror agrees to provide information relating to the above Representation as requested by the Contracting Officer and, when subparagraph (a)(1) or (a)(2) is answered affirmatively, to promptly submit to the Contracting Officer--

(1) A completed Standard Form 119, Statement of Contingent or Other Fees, (SF 119); or

(2) A signed statement indicating that the SF 119 was previously submitted to the same contracting office including the date and applicable solicitation or contract number, and representing that the prior SF 119 applies to this offer or quotation.

K-2 52.204-3 TAXPAYER IDENTIFICATION (SEP 1989)

(a) Definitions.

"Common parent," as used in this solicitation provision, means that corporate entity that owns or controls an affiliated group of corporations that files its Federal income tax returns on a consolidated basis, and of which the offeror is a member.

"Corporate status," as used in this solicitation provision, means a designation as to whether the offeror is a corporate entity, an unincorporated entity (e.g., sole proprietorship or partnership), or a corporation providing medical and health care services.

"Taxpayer Identification Number (TIN)," as used in this solicitation provision means the number required by the IRS to be used by the offeror in reporting income tax and other returns.

(b) The offeror is required to submit the information required in paragraphs (c) through (e) of this solicitation provision in order to comply with the reporting requirements of 26 U.S.C. 6041, 6041A, and 6050M and the implementing regulations issued by the Internal Revenue Service (IRS). If the resulting contract is subject to the reporting requirements described in 4.902(a), the failure or refusal by the offeror to furnish the information may result in a 20 percent reduction of payments otherwise due under the contract.

(c) Taxpayer Identification Number (TIN).

☒ TIN: 74-1334678

☐ TIN has been applied for.

☐ TIN is not required because:

☐ Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have income effectively connected with the conduct of a trade or business in the U.S. and does not have an office or place of business or a fiscal paying agent in the U.S.;

☐ Offeror is an agency or instrumentality of a foreign government.;

☐ Offeror is an agency or instrumentality of a Federal, state or local government;

☐ Other. State basis. _____

(d) Corporate Status.

☒ Corporation providing medical and health care services, or engaged in the billing and collecting of payments for such services;

☐ Other corporate entity;

☐ Not a corporate entity;

☐ Sole proprietorship

☐ Partnership

☐ Hospital or extended care facility described in 26 CFR 501(c)(3) that is exempt from taxation under 26 CFR 501(a).

(e) Common Parent.

☐ Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this clause.

☒ Name and TIN of common parent:

Name TIRR Systems

TIN 76-0192399

K-3 52.209-5 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED DEBARMENT, AND OTHER RESPONSIBILITY MATTERS (MAY 1989)

(a)(1) The Offeror certifies, to the best of its knowledge and belief, that--

(i) The Offeror and/or any of its Principals--

(A) Are ☐ are not ☒ presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency;

(B) Have ☐ have not ☒, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; and

(C) Are ☐ are not ☒ presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in subdivision (a)(1)(i)(B) of this provision.

(ii) The Offeror has ☐ has not ☒, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.

(2) "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions).

THIS CERTIFICATION CONCERNS A MATTER WITHIN THE JURISDICTION OF AN AGENCY OF THE UNITED STATES AND THE MAKING OF A FALSE, FICTITIOUS, OR FRAUDULENT CERTIFICATION MAY RENDER THE MAKER SUBJECT TO PROSECUTION UNDER SECTION 1001, TITLE 18, UNITED STATES CODE.

(b) The Officer shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

(c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror nonresponsible.

(d) Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

(e) The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

K-4 52.215-6 TYPE OF BUSINESS ORGANIZATION (JUL 1987)

The offeror or quoter, by checking the applicable box, represents that-

(a) It operates as ☐ a corporation incorporated under the laws of the State of Texas, ☐ an individual, ☐ a partnership, ☒ a nonprofit organization, or ☐ a joint venture.

(b) If the offeror or quoter is a foreign entity, it operates as ☐ an individual, ☐ a partnership, ☐ a nonprofit organization, ☐ a joint venture, or ☐ a corporation, registered for business in N/A country.

K-5 52.215-11 AUTHORIZED NEGOTIATORS (APR 1984)

The offeror or quoter represents that the following persons are authorized to negotiate on its behalf with the Government in connection with this request for proposals or quotations: (list names, titles, and telephone numbers of the authorized negotiators).

Lex Frieden, Senior Vice President, 713-797-5283

K-6 52.215-20 PLACE OF PERFORMANCE (APR 1984)

(a) The offeror or quoter, in the performance of any contract resulting from this solicitation, ☒ intends, ☐ does not intend (check applicable block) to use one or more plants or facilities located at a different address from the address of the offeror or quoter as indicated in this proposal or quotation.

(b) If the offeror or quoter checks "intends" in paragraph (a) above, it shall insert in the spaces provided below the required information:

Place of Performance (Street Address, City, County, State, Zip Code)

Name and Address of Owner and Operator of the Plant or Facility if Other than Offeror Or Quoter

ILRU The Institute for Rehabilitation
& Research
1333 Moursund Avenue
Houston, Harris, Texas 77030
Other sites to be named

.....
.....
.....

K-7 52.219-1 SMALL BUSINESS CONCERN REPRESENTATION (JAN 1991)

(a) Representation. The offeror represents and certifies as part of its offer that it ☐ is, ☒ is not a small business concern and that ☐ all, ☒ not all end items to be furnished will be manufactured or produced by a small business concern in the United States, its territories or possessions, Puerto Rico, or the Trust Territory of the Pacific Islands.

(b) Definitions.

"Small business concern," as used in this provision, means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the size standards in this solicitation.

(c) Notice. Under 15 U.S.C. 6745(d), any person who misrepresents a firm's status as a small business concern in order to obtain a contract to be awarded under the preference programs established pursuant to sections 8(a), 8(d), 9, or 15 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a definition of program eligibility, shall--

(1) Be punished by imposition of a fine, imprisonment, or both;

(2) Be subject to administrative remedies, including suspension and debarment; and

(3) Be ineligible for participation in programs conducted under the authority of the Act.

K-8 52.219-2 SMALL DISADVANTAGED BUSINESS CONCERN REPRESENTATION (FEB 1990)

(a) Representation. The offeror represents that it ☐ is, ☒ is not a small disadvantaged business concern.

(b) Definitions.

"Asian Pacific Americans," as used in this provision, means United States citizens whose origins are in Japan, China, the Philippines, Vietnam, Korea, Samoa, Guam, the U.S. Trust Territory of the Pacific Islands (Republic of Palau), the Northern Mariana Islands, Laos, Kampuchea (Cambodia), Taiwan, Burma, Thailand, Malaysia, Indonesia, Singapore, Brunei, Republic of the Marshall Islands, or the Federated States of Micronesia.

"Indian tribe," as used in this provision, means any Indian tribe, band, nation, or other organized group or community of Indians, including any Alaska Native Corporation as defined in 13 CFR 124.100 which is recognized as eligible for the special programs and services provided by the U.S. to Indians because of their status as Indians, or which is recognized as such by the State in which such tribe, band, nation, group, or community resides.

"Native Americans," as used in this provision, means American Indians, Eskimos, Aleuts, and native Hawaiians. "Native Hawaiian Organization," as used in this provision, means any community service organization serving Native Hawaiians in, and chartered as a not-for-profit organization by, the State of Hawaii, which is controlled by Native Hawaiians, and whose business activities will principally benefit such Native Hawaiians.

"Small business concern," as used in this provision, means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria and size standards in 13 CFR 121.

"Small disadvantaged business concern," as used in this provision, means a small business concern that (a) is at least 51 percent unconditionally owned by one or more individuals who are both socially and economically disadvantaged, or a publicly owned business having at least 51 percent of its stock unconditionally owned by one or more socially and economically disadvantaged individuals and (b) has its management and daily business controlled by one or more such individuals. This term also means a small business concern that is at least 51 percent unconditionally owned by an economically disadvantaged Indian tribe or Native Hawaiian Organization, or a publicly owned business having at least 51 percent of its stock unconditionally owned by one of these entities which has its management and daily business controlled by members of an economically disadvantaged Indian tribe or Native Hawaiian Organization, and which meets the requirements of 13 CFR 124.

"Subcontinent Asian Americans," as used in this provision, means United States citizens whose origins are in India, Pakistan, or Bangladesh, Sri Lanka, Bhutan, or Nepal.

(c) Qualified groups. The offeror shall presume that socially and economically disadvantaged individuals include Black Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, Subcontinent Asian Americans, and other individuals found to be qualified by the SBA under 13 CFR 124. The offeror shall presume that socially and economically disadvantaged entities also include Indian tribes and Native Hawaiian Organizations.

**K-9 52.219-3 WOMEN-OWNED SMALL BUSINESS REPRESENTATION
(APR 1984)**

a) ☒ Representation. The offeror represents that it ☐ is,
☒ is not a women-owned small business concern.

(b) Definitions.

"Small business concern," as used in this provision, means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in which it is bidding on Government contracts, and qualified as a small business under the criteria and size standards in 13 CFR 121.

"Women-owned," as used in this provision, means a small business that is at least 51 percent owned by a woman or women who are U.S. citizens and who also control and operate the business.

K-10 52.219-22 SIC CODE AND SMALL BUSINESS SIZE STANDARD (JAN 1991)

(a) The standard industrial classification (SIC) code for this acquisition is 8732.

(b)(1) The small business size standard is 3.5 million.

(2) The small business size standard for a concern which submits an offer in its own name, other than on a construction or service contract, but which proposes to furnish a product which it did not itself manufacture, is 500 employees.

K-11 52.222-22 PREVIOUS CONTRACTS AND COMPLIANCE REPORTS (APR 1984)

The offeror represents that--

(a) It ☒ has, ☐ has not participated in a previous contract or subcontract subject either to the Equal Opportunity clause of this solicitation, the clause originally contained in Section 310 of Executive Order No. 10925, or the clause contained in Section 201 of Executive Order No. 11114;

(b) It ☒ has, ☐ has not, filed all required compliance reports; and

(c) Representations indicating submission of required compliance reports, signed by proposed subcontractors, will be obtained before subcontract awards.

K-12 52.222-25 AFFIRMATIVE ACTION COMPLIANCE (APR 1984)

The offeror represents that (a) it ☒ has developed and has on file, ☐ has not developed and does not have on file, at each establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor (41 CFR 60-1 and 60-2), or (b) it ☐ has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

K-13 52.225-12 NOTICE OF RESTRICTIONS ON CONTRACTING WITH SANCTIONED PERSONS (MAY 1989)

(a) Statutory prohibitions have been imposed on contracting with sanctioned persons, as specified in Federal Acquisition Regulation (FAR) 25.10 and in the clause at 52.225-13, Restrictions on Contracting with Sanctioned Persons.

(b) By submission of this offer, the Offeror represents that no products or services delivered to the Government under any contract resulting from this solicitation will be products or services of a sanctioned person, as defined in the clause referenced in paragraph (a) of this provision, unless one of the exceptions in subparagraphs (d)(1) or (d)(2) of the clause referenced above applies or unless listed below.

Product or Service	Sanctioned Person
_____	_____
_____	_____
_____	_____

(List as necessary)

K-14 52.223-1 CLEAN AIR AND WATER CERTIFICATION (APR 1984)

The Offeror certifies that--

(a) Any facility to be used in the performance of this proposed contract is ☐, is not ☒ listed on the Environmental Protection Agency (EPA) List of Violating Facilities;

(b) The Offeror will immediately notify the Contracting Officer, before award, of the receipt of any communication from the Administrator, or a designee, of the EPA, indicating that any facility that the Offeror proposes to use for the performance of the contract is under consideration to be listed on the EPA List of Violating Facilities; and

(c) The Offeror will include a certification substantially the same as this certification, including this paragraph (c), in every nonexempt subcontract.

**K-15 52.230-2 COST ACCOUNTING STANDARDS NOTICES AND CERTIFICATION
(NONDEFENSE) (SEP 1987)**

Note: This notice does not apply to small businesses or foreign governments.

(a) Any contract over \$100,000 resulting from this solicitation shall be subject to Cost Accounting Standards (CAS) if it is awarded to a business unit that is currently performing a national defense CAS-covered contract or subcontract, except when--

- (1) The award is based on adequate price competition;
- (2) The price is set by law or regulation;
- (3) The price is based on established catalog or market prices of commercial items sold in substantial quantities to the general public; or
- (4) One of the exemptions in Federal Acquisition Regulation (FAR) 30.201-1(b) applies.

(b) Contracts not exempted from CAS shall be subject to full or modified coverage as follows:

(1) If the business unit receiving the award is currently performing a national defense contract or subcontract subject to full CAS coverage FAR 30.201-2(a), this contract will have full CAS coverage and will contain the clauses from the FAR entitled Cost Accounting Standards, 52.203-3 and Administration of Cost Accounting Standards, 52.230-4.

(2) If the business unit receiving the award is currently performing a national defense contract or subcontract subject to modified CAS coverage FAR 30.201-2(b), this contract will have modified coverage and will contain the clauses entitled Disclosure and Consistency of Cost Accounting Practices, 52.230-5 and Administration of Cost Accounting Standards, 52.230-4.

A. Certificate of CAS Applicability

The offeror hereby certifies that--

☒ The offeror is not performing any CAS-covered national defense contract or subcontract. The offeror further certifies that it will immediately notify the Contracting Officer in writing if it is awarded any national defense CAS-covered contract or subcontract subsequent to the date of this certificate but before the date of the award of a contract resulting from this solicitation. (If this statement applies, no further certification is required.)

☐ The offeror is currently performing a negotiated national defense contract or subcontract that contains the Cost Accounting Standards clause at FAR 52.230-3.

☐ The offeror is currently performing a negotiated national defense contract or subcontract that contains the Disclosure and Consistency of Cost Accounting Practices clause at FAR 52.230-5.

B. Additional Certification--CAS Applicable Offerors

☐ The offeror subject to Cost Accounting Standards further certifies that practices used in estimating costs in pricing this proposal are consistent with the practices disclosed in the Disclosure Statement where it has been submitted as required by FAR 30.202-1 through 30.202-5.

C. Data Required--CAS Covered Offerors

The offeror certifying that it is currently performing a national defense contract containing either CAS clause (see A above) is required to furnish the name, address (including agency or department component), and telephone number of the cognizant Contracting Officer administering the offeror's CAS-covered contracts.

Name of Contracting Officer:.....

Address:.....

.....

Telephone Number:.....

K-16 NOTICE: The following solicitation provisions and/or contract clauses pertinent to this section are hereby incorporated by reference:

FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION PROVISIONS

52.222-21 CERTIFICATION OF NONSEGREGATED FACILITIES (APR 1984)

52.223-5 CERTIFICATION REGARDING A DRUG-FREE WORKPLACE (JUL 1990)

ILRU BUDGET--YEAR 1

<u>Personnel</u>				112,989
	<u>% FTE</u>	<u>Est.</u>	<u>Hrs</u>	
Lex Frieden Project Director	15%	312	13,800	
Alan Meyer Project Coordinator	100%	2080	36,000	
Laurel Richards Materials Management Director	20%	416	8,216	
Quentin Smith Evaluation Specialist	15%	312	9,875	
Laurie Gerken Technical Assistance Director	15%	312	5,850	
Margaret Nosek Senior Evaluation Specialist	5%	104	2,248	
Dawn Heinsohn Materials Assembly Technician/ Technical Assistance Coordination Technician	100%	2080	25,000	
Shirley Herzog Secretary	50%	1040	12,000	
<u>Fringe Benefits</u> (@ 26.5%)				29,942
<u>Travel</u>				9,115
Project Director to travel to Washington, DC to attend Alternative Dispute Resolution Symposium (\$855 X 1 trip = \$855)				
PCA to accompany Project Director to symposium (\$590 X 1 trip = \$590)				
Project Coordinator to travel to 4 training sites (\$1240 X 4 sites = \$4960)				
Project Coordinator to travel to 2 training sites (\$1355 X 2 sites = \$2,710)				
<u>Equipment</u>				2,900
Computer--\$1,700				
Plain paper fax machine--\$1,200				

<u>Subcontract</u>	40,000
<u>Supplies</u>	3,000

Includes computer diskettes, paper,
and instruments used for evaluation

<u>Other</u>	204,889
--------------	---------

A) Training Activities	123,278
------------------------	---------

1) Phase I--\$87,741

a) Hotel and associated costs, 5 sites for
80 trainees per site--\$53,901

Meeting rooms, 5 days @ \$600 X 5 sites--\$15,000

Breaks:

Morning coffee break, 100 people @ \$4.50
X 5 days X 5 sites--\$11,250

Afternoon soda break, 100 people @ \$2.25
X 5 days X 5 sites--\$5,625

Plus Tax & Gratuity (7% + 17%)--\$4,251

Audio Loop--2 systems @ \$267.50/day X 5 days
X 5 sites--\$13,375

Microphones--3 microphones @ \$25/day X 5 days
X 5 sites--\$1,875

Mixer--\$30/day X 5 days X 5 sites--\$750

Overhead projection--Projector and screen and
labor--\$71/day X 5 days X 5 sites--\$1,775

b) Van--Passenger: \$48/day on six-day rate--
\$48 X 6 days X 5 sites--\$1,440

c) Interpreters--3 1/2 days X 3 @ \$240 X 5 sites = \$12,600
and 1 1/2 days X 3 @ \$240 X 5 sites = \$5,400 totaling \$18,000

d) Miscellaneous interpreters for 1 extra day
equivalent, \$240 X 5 sites--\$1,200

e) Mentors (for persons who are mentally retarded)
\$10/hour X 8 hrs X 5 days X 3 X 5 sites--\$6,000

f) Other hourly staff or other accommodations such as emergency attendant care, transportation, errands, material handling, assisting registration and training staff.

2 people X 3 days X 8 hours @ \$10/hr X 5 sites--\$2,400
 2 people X 6 days X 8 hrs @ \$10/hr X 5 sites --\$4,800

2) Phase II--\$35,537

a) Hotel and associated costs, 2 sites for
 50 trainees per site--\$20,625

Meeting rooms, 6 days @ \$400 X 2 sites--\$4,800

Breaks:

Morning coffee break, 60 people @ \$4.50
 X 6 days X 2 sites--\$3,240

Afternoon soda break, 60 people @ \$2.25
 X 6 days X 2 sites--\$1,620

Plus Tax & Gratuity (7% + 17%)--\$2,433

Audio loop--2 systems @ \$267.50/day X 6 days
 X 2 sites--\$6,420

Microphones--3 microphones @ \$25/day X 6 days
 X 2 sites--\$900

Mixer--\$30/day X 6 days X 2 site--\$360

Overhead projection--projector and screen and
 labor--\$71/day X 6 days X 2 sites--\$852

b) Van--Passenger: \$48/day on six-day rate--
 \$48 X 7 days X 2 sites--\$672

c) Interpreters--4 1/2 days X 3 @ \$240 X 2 sites--\$6480
 1 1/2 days X 3 @ \$240 X 2 sites--2,160

d) Miscellaneous interpreters for 1 extra day
 equivalent--\$240 X 2 sites--\$480

e) Mentors--\$10/hr X 8 hrs X 6 days X 2 X 2 sites--\$1,920

f) Other hourly staff for other accommodations such as emergency attendant care, transportation, errands, material handling, assisting registration and training staff.

2 X 3 days X 8 hours @ \$10/hr X 2 sites--\$960
 2 people X 7 days X 8 hrs @ \$10 X 2 sites--\$2,240

B) Telephone--includes equipment and long distance charges	6,000
C) Postage/Shipping	5,756
1) \$2,000--miscellaneous postage costs	
2) \$3,756--shipping costs of training materials to 7 training sites: \$689-- (costs involved in sending 90 sets of training materials, totaling 610 lbs.) X 4 sites = \$2,756; \$500-- (costs involved in sending 50 sets of training materials, totaling 610 lbs.) X 2 sites = \$1,000	
D) Printing/Reproduction	24,255
E) Office Space Rental	9,856
F) Filming at Training Sites	5,000
G) Costs of Brailling	10,744
H) Stipends (for individuals without financial sponsorship)	10,000
I) Logistical arrangements at each site	10,000
1) \$4000--to be paid to local independent living centers to coordinate logistical arrangements for 1 training site each: \$2,000--St. Louis and \$2,000--Denver	
2) \$6,000--to be paid to local independent living centers to coordinate logistical arrangements for 2 training sites each: \$3,000--San Francisco and \$3,000--Washington	
 TOTAL DIRECT	 402,835
INDIRECT (@ 20.5%)	73,787 *
TOTAL	476,622

*Indirect is charged against \$360,135, which is the total direct charge minus \$2,900 in the equipment category and \$40,000 in the contractual category.

ILRU OPTION YEAR ONE BUDGET

PERSONNEL

89,040

	% FTE	Est. Hrs	
Project Director Lex Frieden	10%	208	9,870
Project Coordinator Alan Meyer	50%	1,040	18,900
Materials Management Director Laurel Richards	20%	416	8,820
Technical Assistance Director Laurie Gerken	15%	312	6,615
Evaluation Specialist Quentin Smith	10%	208	7,035
Mat. Prep./Tech. Assist. Technician Dawn Heinsohn	100%	2,080	26,250
Project Secretary Shirley Herzog	50%	1,040	11,550

FRINGE BENEFITS

23,596

TRAVEL

4,010

One trip for Project Director to attend
meeting with DREDF staff in Washington, D.C.
at \$855

855

Travel for Personal Assistant to accompany
Project Director at \$590

590

Three trips for Project Coordinator to
provide on-site technical assistance
at \$855 per trip

2,565

SUPPLIES

3,600

Estimated at \$300 per month for consumable
supplies

OTHER	26,142
Trainee materials, estimated at 100 pages per trainee at \$0.147 per page for 400 trainees	5,880
Shipping of materials estimated at \$8.00 per participant for 400 participants	3,200
Brailling of materials for an estimated 40 participants	2,968
Miscellaneous photocopying estimated at \$100 per month	1,200
Miscellaneous postage and shipping estimated at \$100 per month	1,200
Long-distance telephone costs for contacting and estimated 80 participants each month at an average charge of \$4.00 per call	3,840
Office rent calculated at the rate of 220 square feet per FTE at \$14 annually for 2.55 FTE	7,854
TOTAL DIRECT COSTS	146,388
INDIRECT COSTS AT 20.5% OF TOTAL DIRECT COSTS	30,009
TOTAL FUNDS REQUESTED FOR OPTION YEAR ONE	176,397

Year 1 Budget Justification

Personnel

Lex Frieden will serve as project director with primary responsibility for executing contractual agreements with DREDF and with the National Council on Independent Living (NCIL), which will have responsibility for specific activities of the project. He will also supervise ILRU staff involved with project activities, and will assure proper fiscal management of funding coming to ILRU for project activities. He will devote 15% of his time and effort to this project.

Alan Meyer will serve as project coordinator with primary responsibility for working with staff at DREDF and ILRU in selecting individuals for the training, handling training logistics, and follow-up activities with training participants. He will devote 100% of his time and effort to this project.

Laurel Richards will serve as materials management director with primary responsibility for oversight of project activities relating to materials preparation. She will devote 20% of her time and effort to this project.

Quentin Smith will serve as evaluation specialist with primary responsibility for developing the evaluation instruments and procedures to be used in the project. He will devote 15% of his time and effort to this project.

Laurie Gerken will serve as technical assistance director with primary responsibility for coordinating technical assistance requests related to ADA that are received at ILRU. She will devote 15% of her time and effort to this project.

Margaret Nosek will serve as senior evaluation specialist with primary responsibility for blending results of ILRU's field initiated research with this project. She will devote 5% of her time and effort to this project.

Dawn Heinsohn will serve as materials assembly technician/technical assistance coordination technician with primary responsibility for word processing, assembling instructional materials, and assistance with technical assistance and follow-up activities. She will devote 100% of her time and effort to this project.

Shirley Herzog will serve as secretary with responsibility for coordinating communication between DREDF, NCIL, and training sites, and general word processing activities. Herzog will devote 50% of her time and effort to this project.

Fringe Benefits

Fringe benefits for the proposed project are requested at the current TIRR rate of 26.5% of wages and salaries.

Travel

Funds are requested for the following:

Project director to travel to Washington, DC to attend Alternate Resolution

Symposium. The basis for the per trip calculation is \$500 airfare, \$75 per night for three nights lodging, and \$30 per day for three days of meals, \$40 miscellaneous expenses, totalling \$855.

Personal care assistant to accompany project director to meeting. The basis for the per trip calculation is \$500 airfare and \$30 per day for three days of meals, totalling \$590.

Project coordinator to travel to four training sites. The basis for the per trip calculation is \$500 airfare, \$75 per night for six nights lodging, \$40 per day for six days of meals, and \$50 for miscellaneous expenses, totalling \$1,240 x 4 trips = \$4960.

Project coordinator to travel to two training sites. The basis for the per trip calculation is \$500 airfare, \$75 per night for seven nights lodging, \$40 per day for seven days of meals, \$50 for miscellaneous expenses, totalling \$1,355 x 2 trips = \$2710.

Equipment

Two pieces of equipment will need to be secured in order to carry out the work described for ILRU staff in this proposal. An IBM compatible 386 computer with high resolution monitor will need to be secured for materials preparation. The price shown for this equipment is based upon a current quotation for a machine with appropriate installed software to handle desk-top publishing and data base access and generation capabilities.

A plain paper FAX machine will also need to be purchased for this project. This equipment will allow for receipt of follow-up data and other information on project activities without requiring cutting and recopying for permanent record keeping. Acquisition of this equipment is essential if the project is to be completed with the support staff indicated in the personnel section of the budget.

Subcontract

The subcontract figure of \$40,000 has been estimated based upon 800 hours of professional staff time to assist with recruitment and selection of trainees, accessing computer networks, managing logistical arrangements at training sites, and carrying out follow-up activities with trainees-- particularly those trainees electing to use computer network capabilities for reporting progress. The hourly rate for these services is \$50, with 384 hours of effort estimated for June Kailes, who will serve as NCIL project coordinator, 48 hours of effort estimated for NCIL staff people at each of the seven training sites, and 80 hours of effort estimated for professional staff in the NCIL central office, who will assist with coordination of these efforts.

Supplies

Supply costs for this project have been estimated very conservatively based on experience in conducting projects of similar purpose and scope. The \$250 per month estimated is reasonable for a project of this scope because of the availability of funding from other sources (i.e., ILRU's field initiated research project on ADA-related services) that will cover costs of some supplies that can be used in both projects.

Other

A) Training activities--see budget for a detailed description of costs associated with this activity.

B) Telephone--\$6,000 in funds are requested to allow for communication with DREDF, NCIL, training sites, and persons requesting technical assistance.

C) Postage/Shipping--in funds are requested for the following:

\$2,000--general mailing costs

\$3,756--shipping costs of training materials to six training sites. See budget for a detailed description of costs associated with shipping training materials.

D) Printing/Reproduction--\$24,255 in funds are requested for printing and reproduction of the training manual. The basis for this calculation is $\$1.47/\text{page} \times 300 \text{ pages} \times 550 \text{ manuals} = \$24,255$.

E) Office space rental--\$9,856 in funds are requested to offset a pro rate portion of the direct costs incurred by ILRU in maintaining off-site (from TIRR) office facilities. The basis for calculating the rent figure is 220 square feet per FTE (3.2)--it should be noted that this square footage includes common areas and is somewhat larger than that usually used because of accommodation needs for persons in wheelchairs--times \$14 per square foot in annualized rent.

F) Filming at Training Sites--\$5,000 in funds are requested to film one of the five-day training sessions. The basis for this calculation is \$1,000 per day x 5 days of filming = \$5,000.

G) Costs of Brailleing

Phase I Brailleing: \$ 7,776

To produce in Braille a master copy of Training Manual--300 pages = approx. 1110 pages in Braille x \$.45/page = \$500

To revise Brailled master copy as needed following each training session--estimate 60 revised pages per training session 60 = 222 Brailled pages x \$.45/page = \$100 x 4 training sessions = \$400

To reproduce 40 distribution copies of the revised Brailled training manual (an estimated ten percent of trainees)--1100 pages x \$.10 x 40 sets = \$4,400

To produce in Braille a master copy of the advanced training manual--100 pages = approx. 367 pages in Braille x \$.45/page = \$165

To reproduce 15 distribution copies of the advanced training manual (an estimated 15% of trainees)--367 x \$.10 x 15 sets = \$551

To produce Brailled copies of overhead transparencies to be used in training sessions--\$44 x 40 sets = \$1,760

Phase II Braille: \$2,968

To produce in Braille a master copy of the ADA training materials developed--200 pages = approx. 667 pages in Braille x \$.45/page = \$300

To reproduce 40 distribution copies of the ADA training materials--667 x \$.10 x 40 sets = \$2,668

H) Stipends--\$10,000 in funds are requested to provide funds for individuals who are without financial sponsorship.

I) Logistical arrangements--\$10,000 in funds are requested to pay local independent living centers to coordinate logistical arrangements for EEOC ADA training.

\$2,000-St. Louis and \$2,000-Denver--for coordinating one training site each.

\$3,000-San Francisco and \$3,000-Washington--for coordinating two training sites each

Indirect Costs

Indirect costs have been calculated at 20.5% of direct costs.



August 19, 1991

James Gleich, Executive Director
Disability Rights Education and
Defense Fund
2212 Sixth Street
Berkeley, California 94710

Dear Mr. Gleich:

I am pleased to provide this letter of agreement stipulating ILRU's and TIRR's willingness to enter into a collaborative relationship with DREDF for the purpose of providing training and technical assistance to facilitate effective implementation of ADA. As we had agreed, TIRR has submitted its cost proposal to EEOC, along with a technical proposal that duplicates the one submitted by DREDF. We at ILRU are quite confident that the technical proposal which both organizations has submitted is very sound and that it addresses key elements identified in EEOC's request for applications through a strong program of training and technical assistance to people with disabilities.

It is my firm belief that the DREDF/ILRU partnership, strengthened by the expertise available from the other partners identified in our proposals to EEOC, offers the very best opportunity for carrying out activities that offer a high likelihood for success in making the promise of ADA a reality in terms of benefit to people with disabilities. DREDF and ILRU truly understand the meaning of empowerment of people with disabilities and reflect this understanding in all aspects of management and service delivery. We also have a true appreciation of the importance of taking the steps needed to make training and technical assistance accessible to people regardless of disability type, and of the need to commit the resources necessary to assure optimal accessibility in training, technical assistance, and other programs that we offer.

We look forward to working with you and the other fine people whose cooperation DREDF has secured to carry out this important work. We also know that leaders of the National Council on Independent Living (NCIL), which will be responsible for a number of important support activities that we will be overseeing through our portion of the project, look forward to their involvement in the proposed project.

Let me take this opportunity to say how much we have enjoyed working with DREDF in pulling together what we feel is very strong application under a very tight time schedule. Funding applications are always difficult to prepare, but they are particularly difficult when the projects are as complex as the one requested by EEOC, and the time for securing commitments and preparing the application is so short.

James Gleich
August 19, 1992
Page Two

Please let me know if we can do anything to assist further in preparing for the proposed work. I would like to offer you the very best wishes in your recently assumed role as executive director at DREDF.

Sincerely,

A handwritten signature in cursive script that reads "Lex Frieden".

Lex Frieden
TIRR Senior Vice President

Technical/Management Proposal

Technical Ability

1. Qualifications, Previous Experience, and Time Commitments of Key Personnel
 - a. Knowledge and Experience with Negotiations and Alternate Dispute Resolution Techniques, and Training and Lecturing on Disability Law and Policy, Including ADA

DREDF Training Experience

The organization assuming the lead role in the proposed project is the Disability Rights and Education Defense Fund (DREDF), located in Berkeley, California. DREDF is, perhaps, the leading organization in the country in terms of providing training on disability law and disability rights in a variety of formats, including lecturing and discussion groups and an extensive technical assistance program, to many groups and individuals, with particular emphasis on imparting information to people with disabilities. DREDF was founded in 1979 with the express purpose of carrying out activities designed to strengthen and protect the civil rights of people with disabilities.

DREDF serves approximately 3,000 individuals each year, with technical assistance and information, referrals, training, advocacy, and legal representation both in administrative hearings and in court. DREDF serves individuals claiming disability-based discrimination in employment, housing, access to public accommodations, transportation, and education.

Advocates and attorneys from all over the country also rely on DREDF for legal expertise and assistance in their own cases, and DREDF is often called upon to join as "friend of the court" in briefs filed in important disability cases being heard at both the appellate and United States Supreme Court. DREDF devotes one-third of its resources each year to assisting parents of children in the special education system in becoming capable self-advocates, so that they may obtain the education and related services the laws guarantee for their children.

DREDF also houses the Disability Rights Clinical Legal Education Program (Clinic), a consortium of five Bay Area law schools and DREDF, training law students in disability law and operating a clinic where students handle actual DREDF cases that are in litigation. At present, there are forty-five cases on the DREDF litigation docket.

DREDF's expertise extends beyond legal interventions at local levels. Since its inception, DREDF has been involved in almost every disability rights case heard before the U.S. Supreme Court. Excerpts from DREDF's briefs have been quoted in landmark Court decision, such as this comment from *School Board of Nassau County, Florida v. Gene H. Arline*:

. . . Myths and fears about disability . . . are as handicapping as are the physical limitations that flow from the actual impairment.

DREDF has also been substantively involved in developing and guiding passage of all major national disability-related legislation passed since its

inception. DREDF's work in Washington on such bills as the Civil Rights Restoration Act, and the Fair Housing Amendments Act have cemented relationships between DREDF and traditional civil rights groups. These efforts have been pivotal in elevating disability issues to the status of legitimate civil rights issues demanding systemic changes at federal, state, and local levels. Nowhere is that elevation more evident than in the recent Congressional passage and signing into law of the Americans with Disabilities Act (ADA), which is both the symbol and substance of DREDF's eleven years work.

In addition to leading the coalition of national disability organizations that worked to enact ADA, DREDF coordinated a massive grassroots effort that involved national, state, and local groups comprising all constituencies within the disability community. During that effort, ties with grassroots organizations throughout the country were further strengthened and were used effectively throughout the period of Congressional consideration and the more recent period of public comment on proposed regulations. Hundreds of groups representing persons with disabilities (e.g., independent living centers, protection and advocacy offices, Developmental Disability Councils, affiliates of national disability organizations) used DREDF legal analyses of the proposed regulations in drafting comments and testimony on the proposed regulations.

In preparation for passage of ADA, DREDF organized an ADA Training Unit to promote effective implementation of ADA. The demand for ADA training programs for organizations around the country has been extraordinary, and has come from disability groups, public entities, and private business. Since the spring of 1990, DREDF has offered training on ADA and implications to approximately 2,000 people in various parts of the country.

DREDF's ADA presentations have ranged in length from one hour overviews to two and one-half day in-depth programs offered in Maine, Massachusetts, Missouri, and Oregon. Others offerings are planned for Illinois, Kansas, and Texas. One-day training programs have been offered in Connecticut, Ohio, Kentucky, Florida, Tennessee, Arkansas, Utah, California, and Wisconsin. Other one-day programs are planned for Louisiana, Indiana, and Alaska.

Organizations requesting ADA training from DREDF are diverse, and include the AFL-CIO, the Department of Veterans Affairs, a consortium of businesses in Miami, Florida, independent living centers nationwide, public transportation agencies, the Continuing Education of the Bar (CEB), The University of California system, and the regional membership of the National Rehabilitation Association. Organizations call on DREDF for ADA training for two reasons:

- 1) DREDF staff have worked on the ADA since it existed only as the dream of the disability community, and throughout the three-year process of educating members of Congress and activating the grassroots network across the country. No other group is as familiar with the legislative history and legal ramifications of ADA.
- 2) DREDF is known throughout the country for excellence in its training activities. DREDF has provided training to more than 5,000 people with disabilities throughout the United States concerning their civil rights under Section 504 of the 1973 Rehabilitation Act, which bars discrimination against

people with disabilities in federally-funded programs.

Summary of 504 Training

With funding provided initially by the U.S. Department of Health, Education, and Welfare, and later by the U.S. Department of Education, DREDF, over a five-year period, provided training to 5,000 people with disabilities from nineteen western and midwestern states. This training focused on individual rights under Section 504 of the Act and on recourse available to people who were denied rights under the Act. DREDF also provided training to persons with disabilities who served as peer trainers for Barrier Free Environments (BFE), the North Carolina organization that received funding to train 2,500 people with disabilities living in the southern and northeastern United States. DREDF training materials and methods were used in all training sites served by both DREDF and BFE.

The 504 training program was originally conceived to address Section 504 implementing regulations requiring the collaboration between people with disabilities and organizations receiving federal financial assistance. In order for these collaborations to be effective in developing and implementing self evaluation and transition plans for organizations to come into compliance with Section 504 and its provisions, it was necessary that people with disabilities serving in "expert" roles in communities have a clear understanding about the law. The training was designed to foster such understanding so that collaborations between disability groups and federally-funded organizations would achieve optimal results. The training had the added benefit of empowering people with disabilities throughout the United States to use Section 504 as a negotiating tool in remedying discriminatory policies and practices used by organizations receiving federal financial assistance.

The 504 training program was built on a peer training model that has been used successfully by DREDF in previous and current training programs targeted to parents of children with disabilities, as well as to individuals and organizations of persons with disabilities. Philosophically and politically, it is crucial that people with disabilities function in training roles--this is true with target audiences composed of persons with disabilities and with audiences composed of persons without disabilities. This model serves the dual purposes of (a) promoting self confidence and self esteem among people with disabilities and (b) demonstrating to people without disabilities that people with disabilities can function effectively in demanding roles requiring clear thinking and assertiveness in getting a job done.

The format for the training involved three and one-half day sessions for about 100 people each session held at accessible hotels. Using a curriculum developed by DREDF staff, the training entailed a day-long substantive overview of the U.S. Department of Education Section 504 regulations, followed by a question and answer session. This overview was followed by focused presentations on developing effective communication and negotiation skills. Opportunities were then afforded to apply newly acquired communication and negotiation skills in small group sessions using structured scenarios as the focal points for discussion. After small group sessions, a video program was used showing people with disabilities in various job and community roles, discussing how discriminatory practices influenced their lives. The purposes

of the video were to demonstrate how discrimination affects people regardless of disability type and to promote coalition building as a means of discouraging and/or addressing discriminatory practices at work and in the community.

The final part of the 504 training required trainees to identify real compliance problems in their communities, which were then analyzed in small groups, with assistance provided by trainers and guest faculty from the appropriate regional offices for civil rights of the U.S. Department of Education. Each trainee was provided a 504 compliance manual, including summaries of the provisions of the regulations. All materials were made available in braille and on audiotape, and sign language interpretation was provided at each training session for persons with hearing impairment.

ADA Training Summary

More recently, DREDF has been actively involved in delivering training on ADA and its provisions. As mentioned previously, ADA training have been offered in a number of formats, ranging from an hour in length to two and one-half days in length. The longer of these training formats--the two and one-half day program--will provide the basis for developing the longer program required under the terms of the EEOC contract. As such, some additional information on the details of this training is in order.

The two and one-half day training program on ADA and its provisions has, thus far, been offered in four locations in Maine, Massachusetts, Missouri, and Oregon. Some 100 people have participated in these programs which begin with a general overview of the background of ADA and its context with regard to other disability civil rights laws. This overview is followed by an explanation of the substantive provisions of ADA in the areas of: (1) definition of disability; (2) employment; (3) public accommodations; (4) state and local government; (5) transportation; (6) telecommunications; and (7) miscellaneous provisions. The final aspect of this explanation of the legislation involves a "tour" of the statute that links each part of the Act together, so that participants have some understanding of the interlocking parts of the legislation. This explanation is accompanied by group exercises and discussion, and it takes about one and one-half days to complete.

The final part of the training requires that each participant do a five minute presentation on one of 20 topics related to ADA. Participants are given time to prepare for the presentations and are questioned by trainers and other participants during the presentations for the purpose of alerting them to issues that they may not have considered in preparing for presentations. At the close of the training, each participant completes an evaluation of the training program and is provided with a resource manual that includes information on who to call--including federal agency staff and DREDF staff--to get answers to specific ADA-related questions.

Evaluations from two and one-half day training programs offered to date indicate a very favorable response to the training. Over 80 percent of participants have rated the overall training program as very good or outstanding. The greatest problem identified by training participants and training faculty alike is that the two and one-half day format does not allow adequate time to explore issues thoroughly and there is too little time for participants to apply what they have learned through small group exercises and

simulation scenarios. Also, the relatively short time frame for presentation of material necessitates that the size of the training group be limited to 20 in each program. A much larger group could be accommodated if more time for small group discussions and participant applications of the material was available and additional training staff could be brought into each training.

Other Disability Rights Training Experience

In addition to these extensive efforts in providing training related to both Section 504 of the Rehabilitation Act of 1973 and, most recently, ADA, DREDF staff are regularly engaged in training on a variety of disability rights issues. Among these activities are the offering of 10 to 12 training per year to parents of children who are disabled and to educational professionals on federal laws governing special education and related services, and operation of the California Support Center on disability rights for legal service providers, sponsoring periodic training offerings to legal professionals. In summary, DREDF staff are very experienced in planning, conducting, and evaluating training on disability rights and legislation to protect and extend those rights. The development of this EEOC training contract on ADA represents a logical extension of DREDF's previous and current activities with regard to disability rights training.

Staff from DREDF will serve as collaborating partners with ILRU/TIRR in this project. These staff have extensive training and technical assistance experience as summarized below:

James Gleich Executive Director of the Disability Rights Education and Defense Fund, has a background of fourteen years of service as the director of state offices in Massachusetts and South Dakota, with attendant responsibilities for all aspects of personnel and fiscal management, including the administration of contracts and grants. As the Director of the Massachusetts Office on Disability, Technical Director of the Massachusetts Department of Public Welfare, and Executive Director of the Sioux Falls Human Rights Commission, Mr. Gleich was responsible for the development, management and administration of state agencies. Mr. Gleich has a disability.

Marilyn Golden is a policy analyst with DREDF and is involved in the development and implementation of federal disability rights laws and regulations as a community organizer and policy developer. In this capacity, she has worked on the Americans with Disabilities Act throughout all the stages of its proposal and passage and now during its implementation. Subsequent to the passage of the ADA Ms. Golden has trained thousands of individuals in more than half of the states in the country on the substantive requirements of this new law, and has trained people on how to train others about the ADA. As the Director of Access California prior to coming to DREDF Ms. Golden managed a resource center on architectural accessibility for people with disabilities. She has also had management responsibility as the Co-Coordinator of the Disabled International Support Effort, which provided material aid and technical assistance to disability organizations in developing countries. Ms. Golden has a disability.

Elizabeth Savage is DREDF's National Training and Technical Assistance Director. She has been deeply involved in the development of disability law and public policy since joining the Epilepsy Foundation of America in 1985, where she was responsible for legislative education efforts on civil rights

and special education issues. Starting in 1988, she coordinated the Capitol Hill efforts of the coalition of over 75 national disability, civil rights, religious and civil organizations which worked to enact the Americans with Disabilities Act (ADA). Ms. Savage organized the massive grassroots effort which brought disability activists from all over the country to Washington to educate their members of Congress on the discrimination faced by people with disabilities, and the need for the strong and sweeping legislation that became the ADA.

Ms. Savage is responsible for developing and managing DREDF's training and technical assistance program for compliance with the ADA. Ms. Savage has educated hundreds of individuals throughout the country on the ADA, training diverse audiences including members of the disability and business communities, and training people on how to train others about the ADA. Ms. Savage has a disability.

Marian Blackwell-Stratton has ten years of experience in the disability rights movement. She began her career as a technical assistance specialist in Section 504 of the Rehabilitation Act of 1973. She was the key resource person for hundreds of individuals in the west and midwestern states who had been trained by DREDF in the substantive aspects of the regulations implementing Section 504, and kept consumers informed of developments in Section 504 law. Ms. Blackwell-Stratton has also worked as a technical writer and researcher in the area of disability rights and independent living, and has run a lawyer referral project which emphasized technical assistance on state and federal disability rights laws.

Currently, Ms. Blackwell-Stratton is working as a paralegal for a private law firm that specializes in disability law, and she will be available on a half-time basis for this project as a technical assistant and researcher. Ms. Blackwell-Stratton has a disability.

Arlene B. Mayerson has been the Directing Attorney of DREDF since 1981, and is Co-Director of the Disability Rights Legal Education Clinic. One of the nation's leading experts in disability rights law, she has been a key advisor to both Congress and the disability community on the major disability rights legislation of the past decade, including the Americans with Disability Act. At the request of members of Congress, she supplied expert testimony before several committees of Congress which were debating the ADA. She provided exhaustive legal analyses of proposed ADA regulations to the disability community, which were relied upon by hundreds of organizations in formulating their own testimony and comments. On behalf of DREDF and over 500 other organizations, Ms. Mayerson prepared and submitted comments on the proposed ADA regulations to the federal agencies charged with enforcing the law.

Ms. Mayerson has devoted her career exclusively to disability rights practice, and has written and consulted for every disability rights case before the U.S. Supreme Court in the past decade, either as counsel or amicus. In addition to her position at DREDF, she is currently a lecturer in Disability Rights law at the University of California campuses at Berkeley (Boalt Hall) and Davis (King Hall), and at Santa Clara University.

Linda D. Kilb a DREDF Staff Attorney, has been involved with DREDF's work on the Americans with Disabilities Act prior to its enactment into law.

Ms. Kilb has educated hundreds of individuals on the ADA, throughout California and in other states. Such training sessions have ranged from brief presentations to those of more than one day in length. Ms. Kilb educates a diverse range of audiences, including individuals with disabilities and their families; advocates and attorneys for persons with disabilities; architects, government officials, and business persons; and attorneys seeking to advise institutional clients on how to comply with the law. Ms. Kilb has a disability.

Consultants

Mary Lou Breslin is a former Executive Director of DREDF and now senior advisor to the organization. She has been a nationally respected leader and authority on the disability rights movement in the United States for the last 15 years. As co-founder, Director and member of the executive committee of the board of directors of DREDF, she has had a profound impact on the formulation of national public policy concerning people with disabilities. She has trained thousands of people across the country in their rights under various federal laws, and has managed large federal contracts and grants under which much of that training was accomplished. Ms. Breslin has a disability.

ILRU Training Experience

Staff from the Independent Living Research Utilization (ILRU) program of The Institute for Rehabilitation and Research (TIIR), will serve as primary collaborating partners in this project. These staff have extensive training and technical assistance experience as summarized below:

Lex Frieden will serve as project director. Frieden was one of the founders of ILRU and was involved in the development and offering of early training programs on independent living carried out by ILRU. He was one of the creators of the first independent living training program using simulation methodology developed and offered by ILRU and Cornell University. During his three-year tenure as executive director of the National Council on Disability, Frieden participated in numerous training programs offered throughout the U.S. and in several other countries. It was under his direction that the National Council on Disability drafted the ADA legislation and engineered its introduction in Congress. Frieden, who has personal experience with disability, is internationally recognized for his work in disability rights and brings the role of project director extensive skills and experience in disability rights and in organizational management. He is co-director of ILRU's field-initiated research project on assessing independent living center staff capabilities to deliver ADA-related services.

Alan Meyer will serve as project coordinator. Meyer has been working in disability-related fields for more than ten years. After entering the field as director of an organization providing personal assistance services to persons with severe disabilities, Meyer became executive director of the Houston Center for Independent Living. After leaving the Center, he became executive director of the Coalition of Texans with Disabilities, the statewide disability consumer group, where he was involved in numerous disability rights educational activities around the state. Over the past seven years he has served as a training consultant for virtually all of ILRU's training programs and regularly participates as a trainer for these programs. Meyer has personal experience with disability.

Laurel Richards will serve as materials management director. Richards has been ILRU director of training since 1978 and has primary responsibility for all training materials production and dissemination. In addition to authoring or co-authoring three monographs on independent living issues ranging from the challenges of service delivery in rural areas to operating effective center boards, she has edited fifteen other monographs on independent living and disability rights issues and numerous informational brochures. She is also editor of the ILRU Insights newsletter, which provided a vehicle to apprise disability consumer groups nationally about the status of ADA and efforts underway to promote its passage. Richards serves as the materials development specialist on ILRU's ADA-related field initiated research project.

Laurie Gerken will serve as technical assistance director. Gerken has been ILRU technical assistance director since 1977. She is recognized for her leadership in disability rights nationally and locally, having led efforts in Houston to secure mainline accessible transportation. She directs ILRU staff who respond to an estimated 6,500 telephone requests and another 5,000 technical assistance requests received through the mail. She serves as technical assistance specialist on ILRU's field initiated research project on ADA. Gerken has personal experience with a disability.

Quentin Smith will serve as evaluation specialist. Smith has graduate level training in educational evaluation and has been involved with disability-related services and education for more than ten years. In addition to having been coordinator of continuing education at TIRR, Smith was formerly director of the Houston Center for Independent Living. He was one of the developers of ILRU's training for independent living center managers and has served as co-director of ILRU's management training programs since they were initiated in 1984. He also serves as a training consultant on Cornell University's independent living center training programs.

Margaret Nosek, Ph.D., will serve as senior evaluation specialist. Nosek has been involved in disability rights activities for her entire adult life. She has served as executive director of the Austin Resource Center for Independent Living and was president of the board of the Houston Center for Independent Living for the past six years. She as state coordinator of Section 504 training in the early eighties and was one of the leaders in promoting passage of ADA. She is project director for ILRU's ADA-related field initiated research project and her effort on the proposed project will insure that findings from this research are incorporated into the EEOC project. She has personal experience with disability.

Like DREDF, ILRU is an organization committed to the independent living philosophy of control and operation of programmatic activities by persons with disabilities. ILRU has been a leader in supporting the development and operation of consumer-controlled, community-based service and advocacy organizations since its inception in 1978. ILRU's leadership in developing training for service and advocacy groups operated by and for people with disabilities is evidenced by its efforts beginning in 1980 to work with faculty of the School of Industrial and Labor Relations at Cornell University to develop and offer a management training program using a simulation methodology. The resulting training program was subsequently offered more than 20 times during the ten-year period and was attended by more than 500 participants, many of whom hailed it as the best training program in which

they had ever participated. The positive results of this initial effort with the simulation format led ILRU to collaborate with Cornell University in the late 1980's to develop a more advanced training program using simulation methodology, which is now offered to independent living staff nationally.

In 1984, ILRU received funding from the Rehabilitation Services Administration to conduct a long-term training program for executive directors of independent living centers. Recognizing the unique needs of the independent living field (e.g., limited travel budgets, small staff sizes precluding lengthy release time to participate in training, management personnel who typically are from diverse backgrounds and may have little in common vis-a-vis pre-employment preparation) ILRU designed and offered a training program that could be tailored to the specialized interests and previous experiences of trainees. The program was later modified and offered to middle managers in independent living centers. This series of management training programs has been provided to more than 200 independent living center managers over a five-year period and has garnered overwhelmingly positive evaluations from program participants.

Perhaps one of ILRU's strengths in meeting the training needs of the independent living field developed from the recognition that opportunities for face-to-face training of many independent living center staff are severely limited, owing to the lack travel funds available to most centers and to the small staff sizes of many centers, precluding release time for staff to attend training. This recognition led ILRU early on to develop its capabilities for providing training information through low-cost, low-technology formats, such as newsletters, brochures, and topical monographs and other publications. This approach has been very well received by disability organizations, and in addition to distributing its bi-monthly newsletter, ILRU Insights, to an international readership of more than 3,200 individuals and organizations, ILRU sends out via mail more than 13,000 training items per year, including brochures, monographs, and fact sheets. These materials are made available in alternate formats (e.g., audiotape, braille, computer diskette) and are offered at cost for reproduction and shipping, with most items available at less than \$8.00 each. Since 1985, a large part of ILRU's efforts to produce and disseminate training materials to the field has been supported by an NIDRR Research and Training Center grant--one of two such grants awarded nationally to address the needs of independent living centers.

ILRU has extensive experience in developing and offering training programs, including the management of training logistics and evaluation of training process and outcomes. However, more importantly for the proposed project, ILRU has extensive experience in developing and disseminating training materials in formats that can be accessed by people with disabilities. These experiences will be drawn on extensively in the proposed collaborative project with DREDF.

NCIL's Training Experience

Another collaborating partner in the proposed training program will be the National Council on Independent Living (NCIL). NCIL represents consumer-controlled, community-based service agencies nationally. NCIL has been extremely effective in providing information to the independent living field on major legislative initiatives, including ADA and the reauthorization of the Rehabilitation Act currently being considered for action next year, at the

national level. It has also been actively involved in presenting and annual conference on independent living that provides one of the few opportunities for representatives of consumer-controlled, community-based service and advocacy organizations to meet together on topics of mutual concern.

NCIL's experience in offering training programs has been limited to date because of lack of funding for staff needed to support such training. However, NCIL has been extremely effective in networking with disability organizations across the country, and this networking capability will be used extensively in the recruitment, local training support, and follow-up activities of the proposed project.

Barrier Free Environments (BFE), Inc. Training Experience

Providing training support on the specifications of ADA regarding building access will be the responsibility of Barrier Free Environments (BFE), Inc. of Raleigh, North Carolina. BFE staff are architects, product designers, and information specialists who have educational preparation in a variety of areas, including interior design, design research, education, and advocacy. The company provides a variety of services, including accessibility design and consultation in all phases of construction planning, accessibility surveys of existing buildings or exterior facilities, product evaluations, and development of workshops and publications on accessible and universal design.

With regard to training, as previously mentioned, BFE was principally responsible for training people in the eastern third of the United States on Section 504 of the Rehab Act and its provisions. BFE worked very closely with DREDF in developing and presenting the 504 training, and a close working relationship has been maintained over the years since the 504 training was offered.

In addition to their leadership role in the Section 504 training, BFE staff have been involved in a variety of training activities both locally and nationally. These include a project funded through the Department of Housing and Urban Development to develop and disseminate information on adaptable housing for persons with disabilities and participation in faculty roles in a variety of training programs sponsored by groups as diverse as the Rehabilitation Services Administration, the American Council for the Arts, and the American Institute of Architects. BFE is recognized nationally for its efforts in promoting accessible design and facilities construction, and BFE staff view training as an essential component of their responsibilities in promoting full accessibility in housing, public accommodations, transportation, and product use.

Council of Better Business Bureaus Training Experience

The primary role to be played by the Council of Better Business Bureaus (CBBB) in the proposed project involves their experience in alternative dispute resolution (ADR). The CBBB has an ADR Division that deals specifically with preparing business people and consumers to use alternative methods for settling disputes. Its experience in dispute resolution involves primarily consumer complaints against businesses, but the approaches used in successfully settling more than two million disputes annually through its central office and affiliate offices nationwide give the CBBB an extraordinary track record from which to develop the ADR component of the proposed training.

At present the CBBB and affiliate members nationally offer periodic workshops and seminars on ADR throughout the nation on an irregular schedule. The Council itself also distributes more than two million pamphlets and booklets annually on a variety of topics relevant to business people and consumers. The experience of the CBBB and its affiliates in ADR in designing, developing, and implementing many different dispute resolution models will strengthen the training program offered to people with disabilities and others by demonstrating effective alternative approaches for resolving ADA-related disputes, thereby saving both public and private sector time and money that might otherwise be directed to costly--and in many cases unnecessary--litigation.

b. Knowledge and Experience with Provision of Technical Assistance in Disability-Related Issues

As regards provision of technical assistance on disability-related issues, the proposed project represents a partnership of three organizations--DREDF, ILRU, and BFE--that are highly regarded for their technical assistance activities relating to disability. DREDF is recognized as the foremost consumer-controlled organization in the country for provision of technical assistance on interpretation of disability law. On average, DREDF staff receive 30 calls per day from around the country requesting assistance on aspects of federal and state laws relating to people with disabilities. Many of the calls managed by DREDF staff, including legal professionals, are very technical in nature, requiring a thorough understanding of relevant laws and of previous court findings relative to alleged discriminatory practices. Such calls typically require 30 to 60 minutes of staff time to answer questions and discuss ramifications of legal issues relating to disability, and it is not unusual for technical assistance requests requiring well in excess of an hour of staff time for completion.

DREDF also publishes the Disability Rights News, which goes to 4,300 individuals and organizations around the country, and includes updates on significant DREDF cases and updates on legislation and issues of interest to people with disabilities and their organizations. DREDF sends out information updates on legislation and regulations and public policy issues to a grass-roots network around the country, and send specialized information, on specific issues such as special education laws on request to advocates and attorneys across the country.

DREDF is perhaps the only organization in the country that has staff and resources to provide in-depth technical assistance on complex legal issues relating to disability without charging a hefty professional fee for these services.

ILRU, likewise, is highly regarded for its technical assistance capabilities. ILRU's particular areas of emphasis include management of consumer-controlled community-based service agencies, provision of personal assistance services, research methods in independent living, and innovative approaches to service delivery for people with disabilities in both urban and rural settings. The importance of the technical assistance component as a means of disseminating information in a timely manner led ILRU to establish technical assistance as one of three major divisions--along with training and research--of the program. ILRU maintains directories of people with expertise

in various disability-related areas and a directory of resources available on a very wide range of disability topics. Both of these directories are updated regularly so that timely information on technical assistance resources can be provided to people contacting ILRU about specific issues. ILRU staff handle an average of 25 technical assistance calls per day, and as mentioned previously, send out approximately 13,000 informational items per year in response to requests for information on specific topics.

BFE also provides extensive technical assistance services relating to design and construction of accessible facilities and products. BFE is contacted regularly by both public and private organizations requesting information about practical applications of accessibility designs. BFE staff have developed a variety of brochures, media presentations, and other informational materials that are used regularly to inform both professional and lay audiences about accessibility issues in design and construction, and these materials are widely distributed.

Although the Council Better Business Bureau (CBBB) has not established its reputation in the area of disability issues, it is well respected for its work in promoting good business practices and in fostering a consumer orientation in business dealings. CBBB brings to the proposed project an important piece of the complex effort needed for effective implementation of ADA--established ties to the business community. CBBB, through its affiliate offices located throughout the country, provides technical assistance to thousands of businesses every day. One of its primary areas of emphasis is alternate dispute resolution techniques that can be used by businesses to resolve disputes between management and staff and between the business and its consumers without going through expensive and time-consuming litigation. CBBB will be the primary technical assistance resource in addressing ADA-related disputes through methods other than litigation.

CBBB is very familiar with the concerns of the business community and with methods for effectively communicating with members of the business community. CBBB's involvement in the proposed project will help to insure that information provided to people with disabilities who are the primary target of technical assistance efforts includes an understanding of the concerns of the business community that must be addressed through individual and organizational efforts toward ADA implementation. It also provides for points of contact with members of the business community who will be called upon to assist with local efforts to disseminate information concerning ADA and its implications for businesses.

c. Knowledge and Experience with Advocacy for the Disability Community, Networks, Issues in Employment, and Rehabilitation Resources

As with the capabilities of partner organizations regarding training and technical assistance, the principal organizations and individuals to be involved in the proposed project bring to the table an extraordinary array of knowledge and experience in disability advocacy, networking, employment issues, and rehabilitation resources. As has been mentioned previously, DREDF has been a pioneer in advocacy efforts on the part of people with disabilities. From its early beginnings with Section 504 training, DREDF has continued to lead efforts to promote disability rights at all levels through both advocacy of guaranteeing and protective legislation, such as ADA, and

through input into the development and interpretation of implementing regulations formulated for specific legislative programs. Further, DREDF has extensive experience working with existing state and federal disability rights laws and regulations affecting the rights of people with disabilities in employment contexts, including preparing amicus briefs on behalf of various parties for cases about employment, program access and coverage issues being heard by the United States Supreme Court. DREDF attorneys are also recognized as experts in the field of disability rights and are regularly called upon by members of Congress to provide technical assistance and expert testimony on employment matters affecting the rights of people with disabilities. DREDF's efforts involve advocacy on the part of individuals as well as organizations. These efforts have resulted in the development of a national network of advocacy resources that was used extensively and successfully in promoting ADA, and that will be used again in the proposed project for purposes of marketing the training program, recruiting qualified program participants, identifying technical assistance resources, and otherwise advancing knowledge of ADA that is the critical end result of the proposed project.

Like DREDF, ILRU has developed an extensive network among groups of people with disabilities nationwide. The mainstay of this network is through ILRU's ongoing contacts with more than 450 independent living centers and programs all across the country. ILRU has developed and maintains the most thorough directory of independent living centers and programs available. In addition to this directory, ILRU maintains an extensive data base on independent living service providers that allows for identification of centers and programs with particular characteristics and mixes of services that can be accessed for technical assistance and other information. ILRU also used this independent living service network effectively in keeping the field informed about progress on ADA and disseminated information through the network on how to obtain further information about or express opinions on ADA and its proposed regulations. ILRU is currently capitalizing on its networking capabilities among independent living service providers to keep the field informed about progress on reauthorization of the Rehabilitation Act, scheduled for consideration in the next Congressional session and to disseminate information about issues of concern regarding the reauthorization as articulated by the National Council on Independent Living, the Consortium of Citizens with Disabilities, get from Laurel, and other organizations interested in reauthorization legislation that is likely to have the greatest impact in promoting access and independence on the part of people with disabilities.

It should also be emphasized that ILRU is a program of The Institute for Rehabilitation and Research, and as such, maintains close ties with rehabilitation professionals from a variety of fields. Approximately 30 percent of the 13,000 informational items that ILRU distributes each year go to rehabilitation service providers which are not consumer-controlled independent living centers. These organizations include rehabilitation hospitals, state developmental disability councils, local non-profit service organizations such as United Cerebral Palsy and Easter Seal Offices, and a variety of other organizations. ILRU staff also participate actively in the National Association of Rehabilitation Research and Training Centers and in national rehabilitation professional organizations, such as the American Congress of Rehabilitation Medicine and the National Rehabilitation Association. These contacts not only allow ILRU staff to keep abreast of developments in rehabilitation, but also provide forums for advocacy of the

consumer-controlled approach to the provision of rehabilitation services--an approach that is too easily forgotten by some rehabilitation professionals when no assertive advocate is involved in service delivery discussions.

BFE is likewise involved in networking and advocacy around disability issues. As indicated previously, BFE is nationally recognized by members of the disability community for its expertise in design and physical access issues, and it is called upon frequently to share this expertise with disability organizations and individuals requiring information on access and design. What BFE brings to the project that the other partners do not is its contacts with the professional design and construction communities. In order for ADA provisions to have the greatest impact in improving access to facilities and products, it is critical that effective lines of communication be established between the disability community and professionals who are involved in design and development decisions in a variety of public and private organizations. Staff of BFE are actively involved with professional organizations, such as the American Institute of Architects and the Rehabilitation Engineering Society of North America, and these networks will be fully exploited in the proposed project.

BFE and its principals have also been actively involved in the development and evolution of several state building codes and all major design standards and related legislation dealing with building and program accessibility for people with disabilities. BFE was actively involved in developing standards of the American National Standards Institute (ANSI A117.1, 1980, 1986, 1991), The Uniform Federal Access Standards (UFAS) and the Minimum Guidelines and Requirements for Accessible Design (MGRAD). It was also active in passage of and rulemaking related to Section 504 of the Rehabilitation Act of 1973, The Fair Housing Amendments Act of 1988, and the Americans with Disabilities Act of 1990.

Another important networking and advocacy resource that will be used in the proposed project is the National Council on Independent Living (NCIL). NCIL has developed an extensive network of consumer-controlled service organizations that has been used effectively in advocating on behalf of passage of ADA and for a number of other purposes. NCIL's networking efforts make effective use of existing "phone trees" using voice communication, as well as existing computer networks nationally, including SERIES, DIMENET, and WIDNET. NCIL's development of consumer-controlled service networks and its involvement in computerized communication services that can be accessed by people with sensory impairments is an important resource that will be used in the proposed project. It will be particularly useful in marketing the program and recruiting participants for the program, as well as in carrying out follow-up tasks with training participants who are working on projects.

d. Time Commitment of Project Director and Other Key Personnel

The proposed project will use personnel effectively in carrying out a complex series of tasks that will need to be completed to assure that the ambitious training and technical assistance goals of this project are realized in the very short time frame indicated. The time commitments of the project director and key project personnel are presented in terms of both projected hours of effort and equivalents in relation to full-time effort on the project.

DREDF Personnel

<u>Name</u>	<u>Position on Project</u>	<u>Projected Hours</u>	<u>%FTE</u>
James Gleich	Project Director	416	20%
Elizabeth Savage	Bus. Liaison/Trainer	416	20%
Marilyn Golden	Training Coordinator	2,080	100%
Arlene Mayerson	Senior Legal Advisor	312	15%
Linda Kilb	Trainer	208	10%
Marian Blackwell -Stratton	Technical Assistant	1,040	50%

ILRU Personnel

Lex Frieden	Project Director	312	15%
Alan Meyer	Project Coordinator	2,080	100%
Laurel Richards	Materials Mgmt. Dir.	416	20%
Margaret Nosek	Senior Evaluation Spec.	104	5%
Quentin Smith	Evaluation Specialist	208	10%
Laurie Gerken	Technical Assistance Dir.	312	15%

BFE Personnel

Ron Mace	Project Director	384	18%
----------	------------------	-----	-----

CBBB Personnel

Peter R. Maida	ADR Training Specialist	770	37%
Barbara Bode	Local Resource Dev. Spec.	354	17%

California Planners

Alan Kalmanoff	Training for Trainers	152	7%
----------------	-----------------------	-----	----

Association for Retarded Citizens

Paul Marchand	Materials Development	100	5%
---------------	-----------------------	-----	----

NCIL Personnel

June Kailes	Project Coordinator	800	38.5%
-------------	---------------------	-----	-------

(Other professional support to be identified at training sites)

2. Experience of the Offering Entity

a. Previous Experience with Successful and Timely Completion of Training and Technical Assistance Projects

The experience of the primary offering entities (DREDF, ILRU, BFE, and CBBB) in carrying out successful and timely training and technical assistance projects is extensive. It should be emphasized that two of these entities, DREDF and ILRU, have directed their efforts primarily to the disability community, and as such to avoid redundancy, the discussion of their previous experience in this regard is included in the next section of this application. As regards the other two primary offering entities, BFE and CBBB, both are experienced in carrying out successful and timely training and technical assistance projects targeted to specific audiences.

In the case of BFE, the usual target audience includes architects, designers, and construction professionals. Examples of the types of successful projects carried out by BFE include:

- "Less Restrictive Housing Environments: Examples, Methods, Designs, and Guidelines for Improving New and Existing Housing," operated from 1986 through 1989 with funding from the National Institute for Disability and Rehabilitation Research.
- "Development and Dissemination of Information on Adaptable Housing for Persons with Disabilities," operated from 1986 through 1987 with funding from the Department of Housing and Urban Development.
- "Accessible Environments for the Disabled," operated from 1975 through 1976 with funding from the National Research Council of the National Academy of Sciences Building Research Advisory Board.

In the case of CBBB, the usual target audience is businesses. Examples of the types of successful projects carried out by the CBBB include:

- "Washington Forum Series," dealing with significant public policy issues of interest to business, government, and consumers, and funded by the business community.
- "Establishing a Community Based Resource for America's Older Citizens," developed for and funded by affiliated BBB offices to provide product-related continuing education to the older consumer.
- "ADA Title III Training and Technical Assistance," which is a recently initiated program targeted to businesses and their customers and funded through grants from The Prudential Foundation, The Borden Foundation, and the General Mills Corporate Contributions Program.

b. Previous Experience with Successful and Timely Completion of Training and Technical Assistance Projects Aimed at the Disability Community

The proposed project draws upon the strengths of two organizations that are very experienced in successful and timely completion of training and technical assistance projects aimed at the disability community. DREDF, the

lead organization in the proposed project, has been conducting projects funded through a variety of sources over its twelve-year history. It should be emphasized here that, because of its aggressive advocacy efforts on behalf of people with disabilities, DREDF has been very selective in pursuit of federal project funding and has only pursued such funding a few occasions to conduct specific kinds of projects. Areas in which DREDF has garnered federal funding and has successfully carried out the projects for which federal funding was obtained are: (1) consumer training and technical assistance on Section 504 of the Rehabilitation Act of 1973; (2) national support to legal services providers nationwide on disability rights law and policy; (3) parent advocacy and training on their rights and responsibilities under P.L. 94-142 and other disability civil rights laws pertaining to education and children with disabilities; (4) educational equity and opportunities for women and girls with disabilities; (5) conducting research into compliance efforts related to Section 504 of the 1973 Rehabilitation Act by the U.S. Department of Health and Human Services; and (5) participation in a consortia of five San Francisco Bay Area law schools to train law students in state and federal disability rights law and policy. The following details describe these undertakings:

* DREDF's training of people with disabilities involving instruction to consumers on Section 504, was supported with six separate contract awards from the U.S. Department of Education Office for Civil Rights. These awards were made between 1980 and 1982, and totaled nearly \$1,750,000. This funding was used to provide 504 training to 3,500 people with disabilities in the west, midwest, and southern parts of the country. One project, done through a subcontract with MESA Corporation in Orem, Utah, was specifically targeted to native Americans with disabilities. One result, in addition to producing thousands of people who were more knowledgeable about their rights and how to secure and protect them, of the 504 training projects was the production training materials on disability rights that are still being used today in dozens of locations around the country.

* During 1981 and 1982 DREDF received funding from the Legal Services Corporation to establish and operate a national disability rights support center. DREDF provided legal information, consultation and support to legal services field offices throughout the country. Services to the field offices included providing legal information and consultation with field office attorneys on disability rights issues and cases in education, employment, public accommodation, housing, transportation and other related issues as well as policy analyses and memoranda on evolving disability rights issues.

* DREDF also received two awards from the U.S. Department of Education, Women's Educational Equity Act Program for a total of \$875,000 over the period 1979 through 1983. It was used to address three goals, (1) assessing the educational needs of a wide range of disabled women and girls; (2) developing written materials and conducting training for education and counseling professionals to address educational needs identified; and (3) developing model curricula and instructional methods for teaching teenage girls and young women with disabilities about their civil rights, educational and career opportunities, and methods of pursuing such opportunities.

The program was very successful and led, in part, to receipt of a second award under the same program to conduct the Disabled Girls in High School Project. This two-year project (1983-85), funded for a total of \$367,234, was designed to evaluate the extent to which gender equity problems preclude full participation of high school girls with disabilities in academic, extra-curricular, and vocational training activities. One product of these two projects that is still in demand is a 125-page book, entitled No More Stares that tells the stories of women with disabilities who have experienced exclusion from full participation in their communities and what they have done to overcome exclusionary behaviors and practices. The book also provided a comprehensive listing of resources that could be accessed for additional information and assistance in dealing with problems that might be related to exclusion based on disability. Several thousand copies of the book have been distributed around the world, and based upon continuing demand for the materials, efforts are underway to secure resources for a second printing.

* In 1984 DREDF received a one-year grant from the U.S. Department of Education to train one-hundred parents of children with disabilities in Contra Costa County, California in their rights under the Education for All Handicapped Children Act. In 1988 DREDF joined forces with two San Francisco Bay Area parent organizations, MATRIX and Parents Helping Parents to form the Northern California Coalition. The Coalition received a three-year grant from the U.S. Department of Education to train parents living in Northern California in their rights under the Education for All Handicapped Children Act. In 1990 the Department of Education re-funded the expanded project for another three years.

* In 1985 and 1986 DREDF conducted a study of Section 504 compliance activities by selected regional offices of the U.S. Department of Health and Human Services. Under a federal contract from HHS, a study of the types of Section 50 complaints being received by various offices and the methods being used to resolve them. At the conclusion of the research a report of findings was filed with HHS that was to be used as the basis for determining whether additional training or technical assistance about Section 504 was necessary for regional field investigators and managers.

* In 1987 DREDF launched a consortia of five San Francisco Bay Area law schools, with support from the U.S. Department of Education provided to one of the five participating schools to offer a disability rights course at the participating schools and a clinical experience for students at DREDF's Berkeley office. The "clinic" now handles numerous litigation matters and has been refunded by the U.S. Department of Education for an additional two years, bringing to six the number of years the program has operated with federal support.

In addition to these federally funded projects, DREDF has successfully conducted a wide variety of disability rights projects funded through numerous private foundations and corporations, as well as through state and local government agencies. Brief summary information on some of the many projects successfully carried out by DREDF over its twelve-year history is attached to this application and provides evidence that DREDF is capable of carrying out

complex projects focusing on disability rights issues according to predetermined time schedules.

ILRU, as the primary collaborating organization for this project, also has extensive experience in providing training and technical assistance directed to disability organizations. ILRU was founded in 1978. Since its inception, it has seen as its principal mission, the effective dissemination of research results and other information relevant to promotion of optimal independence of people with disabilities. This has led ILRU to undertake numerous training and technical assistance projects, funded through a variety of public and private sources. A partial listing of the training projects successfully carried out by ILRU includes:

- A training program developed and offered by ILRU in collaboration with the School of Industrial and Labor Relations at Cornell University that was designed to improve staff capabilities to manage independent living centers effectively. This program, begun in 1980 with funding from the Rehabilitation Services Administration, resulted in the first training program for independent living center staff that employed simulation methodology for instruction. Although originally funded for only a three year period, the program has been offered two or three times each year through 1990 and has been attended by more than 1,000 independent living center management personnel.
- In 1984, ILRU received funding from the Rehabilitation Services Administration to offer long-term management training to executive directors of independent living centers. The program that was developed needed to have the flexibility to accommodate the diverse backgrounds of independent living center staff and had to be one that required relatively little time away from the center. With guidance of an expert advisory committee, an instructional program was developed using an interactive format that provided for exploration of key management issues during a three and one-half day session in Houston, followed by ongoing technical assistance and instructional support provided via mail and telephone contact to participants in their work settings around the country. This program, providing training to 84 participants, initially, has been highly rated by participants.
- In 1987, funding was received from RSA to conduct management training for middle managers of independent living centers. The approach developed for executive directors of centers was modified to be appropriate for middle management personnel, and over a three year period management training was provided to managers of peer counseling programs, independent living skills training programs, and advocacy programs, respectively.
- In 1989, funding was again received from RSA to provide additional training to executive directors of independent living centers. Updating the training content to include current information on such issues as ADA, reauthorization of the Rehab Act, and progress toward RSA's required evaluation of independent living centers, the management training program originally developed for executive directors was reinitiated. It will be completed in 1992, and thus far, evaluation results have been highly favorable.

- In addition to these specific training projects successfully carried out, ILRU received funding from the National Institute on Disability and Rehabilitation Research to establish a Research and Training Center on Independent Living. Originally funded in 1985 for a five-year funding cycle that included specific projects in the three areas of training, technical assistance, and research. During the first-five year funding cycle, seven discrete research projects were completed, and a variety of training and technical assistance programs were initiated and are ongoing. In 1990, ILRU competed successfully for a second five-year funding cycle, and training and technical assistance services continue to be expanded through this funding source, with particular emphasis on resources to enhance the management capabilities of independent living center staff.
- Also in 1990, ILRU received funding from The Robert Wood Johnson Foundation to operate a program to improve service systems for people with disabilities. The program will provide up to \$8.4 million in funding to as many as 12 independent living centers around the country that will be developing improved methods for providing and coordinating services to people with disabilities using consumer-controlled, community-based agencies. Into its second year of operations, twelve sites have been selected and the planning year for the twelve will be completed by the end of January 1992. Based upon performance during the first year of the project, The Robert Wood Johnson Foundation augmented second-year funding to allow for additional initiatives in the areas of media development on disability issues and development of an enhanced management information system that would facilitate planning, marketing, delivery, and evaluation of services offered through independent living centers.

This sampling of previous project experience on the parts of the two primary entities to be involved in the proposed project provides evidence that they have the capabilities to carry out the proposed work successfully and in a timely manner.

3. Demonstrated Understanding of Contract Requirements

a. Quality of the Project Design

This project has been designed to take advantage of specific knowledge and skills of staff in the organizations collaborating in specified activities. The conceptual model that underlies the proposed training design is one that permeates the two primary collaborating organizations. That model is based on empowerment of people with disabilities through instruction and problem solving approaches offered by highly qualified individuals with disabilities who understand not only the technical aspects of laws and regulations, but who also have first-hand experience in dealing with problems of access and accommodation as well as negative attitudes and discrimination regarding people with disabilities that persist in many communities, businesses, and in the minds of some individuals.

The proposed project is designed so that individuals from communities throughout the country will obtain current information on Titles I, II and III of the ADA and its provisions in accessible formats. Activities of the project will also demonstrate how to use this information effectively in

dealing with employers, public entities, private businesses, and others who may be violating, either intentionally or unintentionally, the provisions of ADA. Other activities of the project will focus on various dispute resolution techniques that may be used to resolve problems prior to initiating litigation to address alleged violations of ADA or other disability civil rights statutes.

As indicated in the instructions provided for applicants, training will be provided in two phases of workshops, preceded by and intensive curriculum development and faculty training period that has been compressed into three months. The plan for accomplishing the preparatory tasks (Tasks 1-4) outlined in the application materials is as follows.

Task 1: Develop specific workshops and technical assistance objectives.

Task 1.1 will involve developing structured interview formats to be used with persons with disabilities, employers, knowledgeable EEOC staff in Washington and district offices, and with knowledgeable DOJ staff to determine:

1. levels of knowledge about Titles I, II, and III ADA regulations;
2. activities undertaken by people to understand better their rights and responsibilities under Titles I, II, and III of ADA;
3. specific problems persons with disabilities are encountering in claiming their rights under Sections 503 and 504 of the Rehabilitation Act of 1973 and state laws prohibiting discrimination against people with disabilities in employment; and
4. training and technical assistance resources that are currently available and that might be adapted for use in this project.

It is believed that three different interview formats will be most appropriate for gathering information from the target audiences identified: one for persons with disabilities, one for employers, and one for EEOC and DOJ staff. Although the exact number of people from each of these categories to be interviewed will not be determined precisely until after consultation with EEOC and DOJ staff, at minimum ten people with disabilities, ten employers, five EEOC staff and five DOJ staff will be interviewed. Estimating 30 minutes per interview, 15 hours of interview time has been projected and is reflected in budgetary considerations for the project. The interview formats will be prepared by the end of the first project week and submitted to EEOC for review.

The 30 interviews will be completed during weeks three and four primarily by Marian Blackwell-Stratton and Marilyn Golden, both with DREDF staff and both very knowledgeable about ADA and about typical knowledge levels of most people with disabilities and most employers. It should be noted here that these interview activities are very similar to a data gathering activity to be carried out by staff at ILRU in conjunction with a NIDRR-funded field-initiated research project designed to assess the capabilities of independent living center staff to deliver ADA-related services to people with disabilities, employers, and others. The results of the ILRU data gathering activities will be provided to DREDF for the purpose of comparison and to

assess the degree of consistency in the two information-gathering efforts. In case where some inconsistencies are noted in the results of the two efforts, decisions will be made as to whether to conduct additional interviews for further clarification.

Task 1.2: Analyze and synthesize the results of the interviews for use in preparing objectives for Phase One Workshops.

Analyses and synthesis of results of at least 30 interviews will be completed by the end of project week four. Specifically, the interview analyses will be designed to provide information on the content and methods of training to be used in preparing 400 people with disabilities to achieve objectives in these five areas:

- promoting understanding by people with disabilities of individual rights under Titles I, II, and III, of the ADA regulations for the purpose of effectively communicating basic rights and responsibilities to other persons with disabilities, employers, and other covered entities.
- developing and implementing projects, subject to appropriate approval by the EEOC program officer, to provide at least 50 other people with disabilities with an overview of the rights under Titles I, II, and III of the ADA.
- developing and implementing projects, subject to appropriate approval by the EEOC program officer, to provide at least 30 employers and other covered entities with an overview of their responsibilities under Titles I, II, and III of the ADA.
- provide employers and other covered entities with information necessary to understand the needs and abilities of people with disabilities.
- settle disputes with employers and other covered entities through education and alternative dispute resolution methods.

The objectives that will be developed under this task area will be targeted to assuring competencies in explaining the Titles I, II, and III of ADA and its regulations so that trainees can deliver an accurate overview to specific audiences. As such, the objectives will be prepared with action verbs, such as "summarize in writing or in another appropriate format" As part of the requirement for participation in Phase One workshops, each participant will agree to conduct training activities for persons with disabilities and employers and other covered entities as indicated in the areas summarized above. In addition, objectives will be developed based upon the results of interviews and the previous experience of the trainers that will focus on fostering projects designed to encourage systemic changes in communities and states from which participants are selected. For example, one objective might focus on techniques for promoting representation of the disability community on the city planning board. This objective might guide participants through the process of selection of persons to serve on such boards and describe strategies that could be used to influence the selection process for the purpose of increasing the likelihood that a person with a disability would be selected. The preparation of draft Phase One training objectives will be managed primarily by Marilyn Golden and Marian Blackwell-Stratton and will be completed by the end of project week four.

Task 1.3: Analyze and synthesize results of the interviews for use in preparation of Phase Two workshop objectives.

Analyses and synthesis of interview results will also be carried out to identify the objectives for Phase Two training to be provided to 100 individuals selected from the 400 participating in Phase One training. Participants in Phase Two training will be required not only to demonstrate knowledge of and ability to communicate information about Titles 1, 2, and 3, of ADA, but will also be required to demonstrate competencies in a variety of other areas related to ADA. Specifically, the objectives for Phase Two training will cover ten major activity areas in which trainees will be expected to demonstrate competency. These are:

- demonstrating understanding of and ability to communicate correctly the requirements, rights, and responsibilities of people with disabilities and employers under the regulations implementing Title I of ADA, including but not limited to the ability to assess the accessibility of facilities, identify cost effective methods of attaining compliance, and understand the reasonable accommodation process and identify alternative sources of funding for reasonable accommodation.
- using a variety of disability-related technical assistance resources and data bases, including but not limited to the technical assistance centers to be funded by NIDRR, REHABDATA, ABLEDATA, SERIES, Job Accommodation Network, and the IBM Atlanta Computer Technology Assistance Center to provide information and referral services.
- providing training in effective negotiation skills to people with disabilities.
- providing employers with information necessary to understand the requirements and abilities of people with disabilities in the workplace.
- using alternative dispute resolution techniques to resolve disputes between persons with disabilities and employers for purpose of achieving voluntary compliance with Title I of the ADA.
- identifying and providing training and technical assistance to conflict resolution centers and programs to enable them to resolve effectively disputes between people with disabilities and employers under ADA.
- understanding the structure of EEOC and procedures governing enforcement of Title I of the ADA, including the charge filing process, how to document discrimination, and filing a private lawsuit.
- providing ADA training, technical assistance, and assistance in the effective use of alternative dispute resolution techniques to assist EEOC in enforcement of Title I of ADA.
- developing and implementing projects to educate at least 100 people with disabilities on their rights under Title I of the ADA.
- developing and implementing projects to assist at least 50 employers in their communities in complying with the Title I ADA regulations.

As in the case of Phase One training activities, Phase Two will also include objectives designed to encourage projects targeted to systemic issues, such as getting members of the disability community involved in running for school boards and city council seats. These broader objectives will focus on community organizing skills as well as on process approaches for promoting involvement of persons with disabilities in systemic change activities. Preliminary objectives to address each of these activity areas will be developed primarily by Marilyn Golden and Marian Blackwell-Stratton by the end of project week four.

Task 1.4: Prepare a report for the EEOC Project Officer for review and approval on the activities in Tasks 1.1-1.3.

By the end of the fourth week of the project, a report will have been prepared that summarizes the results of the interviews with persons with disabilities, employers, EEOC staff and DOJ staff, and that includes the draft of objectives for both Phase One and Phase Two Workshops. Marilyn Golden and Marian Blackwell-Stratton will have primary responsibility for preparation of the report, with additional assistance provided by selected DREDF staff, including Elizabeth Savage and Arlene Mayerson. Specifically this report will include:

- names or other relevant information about persons interviewed.
- a narrative summary of the major findings of the interviews.
- a draft of specific objectives developed for both Phase One and Phase Two Workshops.

Task 1.5: Submit the report prepared in accordance with Task 1.4 to the EEOC Project Officer, requesting suggested revisions or comments to be provided by the end of project week five.

In accordance with requirements specified in the application package, this task will be completed by the project coordinator, Marilyn Golden, by the end of week four.

Task 1.6: Incorporate revisions or make other changes in the draft report (Task 1.4) in accordance with the suggestions of the EEOC Project Officer and submit a copy of the revised report to the EEOC Project Officer for final approval.

In accordance with requirements specified in the application package, this task will be completed by the project coordinator by the end of project week six.

Task 2: Locate and develop educational materials and methods to be used in conducting workshops and follow-up technical assistance based on specific objectives identified in Task 1 and locate and provide expert trainers to act as instructors.

Task 2.1: Conduct a literature review which shall include, but is not limited to, professional journals and other publications pertaining to education, training, and program management.

Work on this task has been underway since ADA was in the early stages of development. The project personnel understand the importance not only of understanding the legal language of ADA and its accompanying regulations, but also of understanding the legislative intent behind the law. However, in order to assure that the most comprehensive literature review possible has been completed, a thorough review will be undertaken to be sure that relevant publications are available for training and technical assistance activities. This review will particularly focus on documents produced by the EEOC, the Department of Justice, NIDRR, and the Rehabilitation Services Administration, with particular attention to legislation, regulations, and guidelines which apply to ADA. Special attention will also be focused on publications by programs serving persons with disabilities. Examination of published information on methods already developed through other federal contracts of a similar nature will also be scrutinized and project staff at other projects will be contacted when appropriate for additional information on project content and methods and any outcomes realized to date.

One set of information sources that will be intensively examined are the rehabilitation and disability related computer data bases and technical assistance networks supported through public and private funding sources. These include ABLEDATA, REHABDATA, the Job Accommodation Network, the SERIES Network, and the IBM Atlanta Computer Technology Technical Assistance Center. These data bases will be accessed using available technology. In the event that this review reveals that new methods or materials relevant to ADA or its provisions are available through one or more sources, those sources will be contacted to secure materials and/or other information relating to these developments. Review activities under this project task have been ongoing for some time, will be continued throughout the project period, with initial updating reviews conducted in project weeks one through seven primarily by Marian Blackwell-Stratton, with assistance from Marilyn Golden and selected other staff and consultants.

Task 2.2: Provide sufficient personnel resources and levels of effort provided through available staff or contractor team arrangements to carry out specific activities related to project direction and administration, training development and instruction, and project logistics and support.

In order to secure the services of the best mix of individuals and organizational entities to carry out the proposed project, DREDF has committed appropriately qualified DREDF staff to the project and has entered into contractor team arrangements to carry out discrete aspects of project operations. For each of the major functional areas identified in the application packet, the following plans have been developed for carrying out the proposed work.

Project Direction and Administration

Overall project direction and administration will be the responsibility of DREDF staff. Serving in the role of project director will be Mr. James Gleich, who will have overall responsibility for overseeing planning activities, supervising project staff, executing contractor arrangements with ILRU, BFE, CBBB, ARC, California Planners and Mary Lou Breslin assuring proper fiscal management, and monitoring project progress. Mr. Gleich has extensive experience in project management, including fiscal management and management of contractual arrangements. He has management experience with statewide

programmatic activities and is very familiar with directing disability-related projects and programs. He will devote 20 percent time and effort to the project.

Day-to-day management of project activities will be the responsibility of Marilyn Golden, project coordinator. She will be primarily responsible for developing the conceptual framework for training, overseeing the development of the training curriculum, delivering the training program, coordinating technical assistance activities provided through DREDF, preparing DREDF project reports, and dealing with training staff of organizations participating through contractor team arrangements. As the primary instructor for the training programs and the general coordinator of all project activities, Ms. Golden will devote full time to the project.

Day-to-day provision of technical assistance services through DREDF will be the responsibility of Marian Blackwell-Stratton, who will also be responsible for carrying out literature reviews and for conducting interviews necessary for curriculum development. Ms. Blackwell-Stratton has extensive experience in provision of technical assistance and in resource identification and cataloging. She will devote full time effort to the project, with the largest part of that effort devoted to provision of technical assistance, and the remainder to conducting literature reviews and interviews.

Assisting with various aspects of project management will be; (1) Elizabeth Savage (20 percent time and effort), who will have responsibility for helping with curriculum development and training and will be principally responsible for liaison with the business community in general and with the Council of Better Business Bureaus in particular; (2) Arlene Mayerson (15 percent time and effort), who will have responsibility for supervising legal technical assistance activities and for dealing with complex legal issues that may be raised by training participants; and (3) Linda Kilb (10 percent time and effort) who will assist with selected training.

In order to capitalize on the strengths of DREDF project staff, some management responsibilities will be dealt with through a contractor team arrangement with ILRU. The management components for which ILRU will have responsibility include: (1) recruitment and selection of trainees; (2) preparation of training and technical assistance materials; (3) management of training logistics; and (4) follow-up with participants who are carrying out required projects.

Overall management of ILRU's components of the proposed project will be the responsibility of Lex Frieden, who will serve as ILRU project director. He will be responsible for executing contractual agreements with DREDF and with the National Council on Independent Living (NCIL), which will have responsibility for specific activities of the project. He will also supervise ILRU staff involved with project activities, and will assure proper fiscal management of funding coming to ILRU for project activities. Frieden has extensive experience in project development and management, as well as in disability advocacy. He will devote ten percent time and effort to the project.

Management of trainee recruitment and selection, training logistics, and follow-up with trainees will be the responsibility of Alan Meyer. Meyer will be responsible for working with staff at DREDF and ILRU in developing

selection criteria, preparing recruitment material, implementing the recruitment program, and notifying individuals selected for training and approved by EEOC. Meyer will also be responsible for handling training logistics, including working with on-site support staff identified to work at each training site, going to each site in advance to assure readiness for the training, and providing on-site supervision of local support staff throughout the training program. He will also be primarily responsible for follow-up activities with training participants who are carrying out projects. These follow-up activities will include regular contact by telephone, mail, and/or electronic mail to determine how projects are progressing and to identify technical assistance needs that may be required to advance projects toward their goals. Meyer is experienced with project management and with working with disability groups at both local and statewide levels. He will devote full time to the proposed project.

Oversight of project activities relating to materials preparation will be the responsibility of Laurel Richards. It will be her responsibility to communicate regularly with training staff at DREDF concerning the availability of training materials, obtain such materials from DREDF staff, assure that they are in ready form for reproduction and inclusion in training manuals, and supervise support staff in preparation of the materials and shipping finished materials to training sites in time for delivery of the training. Richards is responsible for all materials development projects carried out through ILRU and has supervised numerous other large-scale materials preparation and distribution projects. She will devote 20 percent time and effort to the project.

Responsibility for developing the evaluation instruments and procedures to be used in the project, will be primarily the responsibility of Quentin Smith. His responsibilities will include development of pre-tests and post-tests for assessing participants' knowledge and skill levels before and after training and preparation of participant satisfaction questionnaires designed to identify aspects of the training program that might be improved, expanded, or eliminated. Smith has graduate level preparation in educational evaluation and has served as evaluator for numerous educational projects undertaken through the Division of Allied Health Sciences at Baylor College of Medicine, as well as through ILRU. He will devote 15 percent time and effort to the project and will be assisted by Margaret Nosek, who serves as project director on a NIDRR-funded field initiated research project relating to ADA. Nosek, will devote five percent time and effort to the project for the purpose of assuring that results from the field initiated research activity are incorporated into the proposed project.

Laurie Gerken will oversee channeling of technical assistance requests related to ADA that are received at ILRU. Some ADA-related requests received by ILRU will require only general knowledge of the law and will be answerable by ILRU staff familiar with ADA and its provisions. Other ADA-related information requests will be more complex, requiring more in-depth answers or technical interpretations. Still others will be from training participants who are unsure if their requests should be directed to DREDF or to ILRU. Gerken will work with technical assistance staff at ILRU to prepare them for screening calls and for directing technical assistance requests to the proper individual. She will devote five percent time and effort to the proposed project.

These specific support functions will be managed by staff at ILRU, just as specific training responsibilities will be managed by consulting staff from other organizations as discussed in the ensuing section of this proposal. In order to assure that functions to be carried out through contractor team arrangements are managed effectively, a regular reporting schedule will be developed for each arrangement entered into. The frequency of the reporting schedule will depend largely on the scope and complexity of the tasks assumed under these contractor team arrangements.

For example, in the case of ILRU's responsibilities on the project, several reporting relationships will be established both to assure that people at appropriate levels are communicating effectively with their counterparts in the partner organization and to provide for backup in the event of a missed communication. In the case of the ILRU arrangement, Jim Gleich at DREDF will establish monthly contacts with Lex Frieden at ILRU to discuss general progress on the project and to deal with specific problems that may have develop as the project progresses. In the event of problems, the frequency of contacts between the two project directors may be increased over a limited time period, but it will never occur less frequently than monthly. In addition, Frieden will provide Gleich with copies of reports generated by ILRU staff on a monthly basis and will add comments or concerns that need to be addressed at the project director's level.

At other levels, the intensity of activity will require more frequent contacts than will be scheduled between the two project directors. For example, Alan Meyer, who will be handling trainee recruitment and selection, logistical arrangements, and participant follow-up activities, will be communicating with Marilyn Golden and Marian Blackwell-Stratton at least weekly and, during periods of peak activity, probably daily. The schedule for these contacts will be reconsidered by the principals as the project progresses, with contact times and specific topics to be dictated by the current work activities. In addition, Meyer will provide the DREDF staff with weekly written updates on current aspects of the project, using FAX capabilities of the two organizations.

Likewise, Laurel Richards will be communicating with Marilyn Golden on a schedule that will vary from weekly to monthly, depending upon the current levels of activity involving materials preparation. During peak times, such as those just before scheduled training sessions, contacts may be increased from weekly to every other day, to assure that work is on schedule and that all materials will be ready for use on time.

The key to assuring adequate monitoring of project activities to be carried out through contractor team arrangements is to clearly identify reporting lines and to establish at least preliminary reporting schedules for parties on both sides. In the case of ILRU arrangement, the following reporting lines and expected contact frequencies are anticipated at the outset:

- Lex Frieden to Jim Gleich--monthly
- Alan Meyer to Marilyn Golden/Marian Blackwell-Stratton--weekly
- Laurel Richards to Marilyn Golden--bi-weekly
- Quentin Smith/Peg Nosek to Marilyn Golden--bi-weekly
- Laurie Gerken to Marilyn Golden--monthly

Reporting lines for contractor team arrangements are anticipated as follows initially:

Council of Better Business Bureaus
 Barbara Bode to Elizabeth Savage--bi-weekly
 Barrier Free Environments
 Ron Mace to Marilyn Golden--bi-weekly
 Association for Retarded Citizens
 Paul Marchand to Marilyn Golden--monthly
 California Planners
 Alan Kalmanoff to Marilyn Golden--monthly
 Mary Lou Breslin to Marilyn Golden--monthly

The arrangement for NCIL's involvement in participant selection and recruitment and in operation of computer networks will be managed through ILRU, with June Kailes reporting to Alan Meyer on a bi-weekly basis initially, to be increased in frequency as recruitment activities intensify.

The problems of fragmented management responsibilities are difficult to address in any project. However, with the experienced project personnel selected from all partner organizations and with the electronic communication capabilities afforded by FAX and by modem, careful monitoring of project activities carried out over significant distances is quite feasible. Clear reporting lines will be delineated for this project, and adherence to reporting schedules that are adjusted to match the intensity of efforts underway will help to assure that project activities remain on schedule and that deadlines are met.

Training Development and Instruction

This project has been designed to draw upon the specialized expertise of a cadre of individuals who have national recognition for their work on disability rights and related fields, such as alternative dispute resolution. For DREDF, the training development and instruction personnel will be primarily Marilyn Golden, who will have major developmental and instructional responsibilities; Marian Blackwell-Stratton will assist with identification of training content through literature reviews and interviews; Arlene Mayerson, who will serve as the technical expert on legal aspects of the curriculum and will participate in development of alternative dispute resolution training sections; Elizabeth Savage, who will assist with curriculum development in the area of business involvement and will serve as a trainer for some of the seven training programs offered; and Linda Kilb, who will serve as a trainer in two Phase One training and one Phase Two training. Each of these individuals has been actively involved in ADA training since before enactment of the legislation. Their qualifications are discussed elsewhere in this proposal and are summarized in attached biosketches.

However, to bring the full breadth of expertise needed to do the best possible job on the project, DREDF has reached outside of the organization to secure the services of experts in particular areas. Mary Lou Breslin, former DREDF executive director will assist with curriculum development and review and will serve as a senior trainer during several training offerings. Breslin is well known for her leadership on disability rights issues; has extensive experience as a trainer for a wide variety of audiences on disability rights law and regulations; has managed numerous federally funded training contracts

and grants for people with disabilities and was one of a handful of persons nationally who played a major role in passage of ADA. She is intimately familiar with the ADA legislation and its implementing regulations.

In order to assure accuracy and understanding of design specifications relating to accessibility and product design, Ron Mace, FAIA, will assist with curriculum development and with instruction on specifications and their meaning with respect to accessibility. Mace is president of Barrier Free Environments and proprietor of Mace and Associates, Architects, in Raleigh, North Carolina. He is one of the foremost experts in the country on accessibility for people with disabilities and is called upon frequently by public and private organizations to serve as an expert in both legal proceedings and legislative rulemaking.

Mr. Mace is critical to fulfilling the specific goals of this project because he is recognized as a leading expert in the new technical regulations which govern architectural access requirements for compliance with the ADA by covered entities and programs. He is specifically knowledgeable about the recently published Minimum Guidelines and Requirements for Accessible Design (MGRAD), which contain new requirements for architectural access to a wide range of facilities, as well as predecessor standards and guidelines. Compliance with the ADA calls for specific knowledge about the MGRAD regulations, with which trainees must be familiar if they are to become effective and knowledgeable trainers in their communities on the relevant provisions of the ADA. Mr Mace will be responsible for developing related curriculum materials for the trainings, including audio-visual materials where appropriate. Mr. Mace is recognized as the nations leading expert in this area.

To obtain expertise in alternative dispute resolution (ADR), DREDF called upon its contacts with the Council of Better Business Bureaus. Specifically, Peter R. Maida, Ph.D., J.D., will take the lead in developing curriculum content on ADR, in doing initial training of selected individuals who can provide technical assistance on ADR methods, and in providing training to participants in all seven training programs to be held over the course of the year as part of Phase One and Phase Two activities. Maida has eight years experience in ADR methods and is manager of ADR Skills Development of the Alternative Dispute Resolution Division of the Council of Better Business Bureaus.

Another Council of Better Business Bureau staff member who will assist in curriculum development and follow-up technical assistance is Barbara Bode, management consultant with the CBBB. Bode will be responsible for working with participants to facilitate contacts and develop relationships with members of the Bureau at the local levels to ensure successful follow-up training and technical assistance on the requirements of the ADA to members of the business community as required by EEOC. As a person with disability Ms. Bode brings personal experience to this undertaking.

Alan Kalmanoff, Ph.D., J.D., executive director of California Planners in Berkeley, California will provide expert assistance in preparing DREDF trainers who will be responsible for the largest part of training activities to be carried out through this project. Kalmanoff is an expert on instructional process who provided initial training to DREDF staff prior to initiation of Section 504 training activities in 1979. He will serve in a

similar role relative to preparation of staff for ADA training. He will also critique process aspects of Phase One training and prepare recommendations for improving training methods used by instructional personnel. He will also attend both Phase Two training to work with participants on the their instructional techniques and to help them prepare for offering training in their communities. Such process instruction is essential to assure that trainees are not only equipped with the technical information and skills needed to fulfill their roles required by this project, but also with the capacity to communicate clearly and effectively as trainers and technical assistance experts.

Finally, the services of the Association of Retarded Citizens has been secured to develop an alternate curriculum for use by DREDF and ILRU during the trainings so participants with cognitive disabilities and low reading skills can benefit equally from the trainings. Although ARC staff are not represented as key personnel, their expertise in developing accommodations for persons with cognitive disabilities is nationally recognized and their contribution is central to guaranteeing that people with such disabilities can benefit and participate in the program.

The individuals who will be used to augment DREDF's staff in developing and providing training and technical assistance services have been carefully selected to assure access to specific areas of expertise that is not available through the legal and disability rights instructional and technical assistance staff the constitute DREDF's full-time and part-time staff. These individuals are all recognized experts and are people in whom DREDF has the utmost confidence.

Project Logistics and Support

Project logistics and support will be the primary responsibilities of staff of ILRU, which will serve in a contractor team arrangement with DREDF in carrying out the activities of the project. Expertise to be provided by ILRU staff includes recruitment and selection of trainees, instructional materials preparation and distribution, logistical management, training evaluation, and trainee follow-up and progress reporting. ILRU, as an NIDRR-funded national research and training center, has extensive experience in all of these areas, and as indicated in the previous section on project direction and administration, has personnel with appropriate knowledge, skills, and experience to deliver the required services and products in each of these areas. Essentially, the breakdown of responsibilities for each of these areas is:

Recruitment and selection of trainees, training logistics management, and trainee follow-up and progress reporting--Alan Meyer;

Materials development and assistance with trainee recruitment and selection--Laurel Richards;

Oversight of technical assistance services and assistance with trainee follow-up-- Laurie Gerken;

Training evaluation and assistance with trainee follow-up and progress reporting--Quentin Smith and Margaret Nosek;

Overall ILRU project monitoring and staff supervision--Lex Frieden.

In addition to having primary responsibility for the indicated logistical and support functions, the ILRU project director, Lex Frieden will oversee work to be carried out through an agreement with the National Council on Independent Living (NCIL) in support of this training program. Specifically, this work will involve assisting ILRU staff with recruiting and selecting trainees, accessing and using computerized networks serving the disability community for marketing the training program, coordinating the identification of on-site support personnel for the five Phase One and two Phase Two training programs, and assisting with trainee follow-up using computer networking.

Responsibility for this portion of NCIL's efforts will reside with June Kailes. Kailes, who will be assisted by NCIL staff in the central office, as well as by NCIL staff to be identified in areas where training is to be offered. Kailes is a well known disability rights advocate who has served as NCIL's primary liaison with computer networks serving the disability community in recent years. Kailes was formerly executive director of the Westside Center for Independent Living in Los Angeles and was extremely active promoting passage of ADA. Her knowledge of disability issues in general, ADA specifically, and her experience in using computer networking technology make her an ideal choice for this aspect of project support. NCIL's efforts in these areas are estimated to require 800 hours of professional staff time over the first project year.

NCIL will also provide assistance with two other aspects of this project. Using the services of a staff person to be named at a future date, NCIL will provide assistance in recruitment and selection of trainees by identifying local resource persons who can assist with outreach to communities in targeted training areas, and will assist with securing on-site support for training efforts to be carried out in each of the five Phase One sites and two Phase Two sites. Among the services that NCIL will provide in this area are identification of people with disabilities in the training locales who will serve as support staff and identification of additional accessibility support services, such as braille services and sign language interpreting that may be required during on-site training. NCIL's efforts in these areas are not expected to require more than a ten percent FTE professional staff person and a twenty percent non-professional support staff person to assist with coordination of activities.

This division of responsibilities between training development and delivery and management of logistical and support services has been designed to minimize the likelihood that persons with primary training responsibilities will be distracted from their training roles due to logistical problems and issues. It also draws upon strengths of ILRU, which not only has extensive staff experience in planning, offering, and evaluating training programs for persons with disabilities, but which also has the support staff infrastructure and experience with materials preparation and dissemination to effectively carry off the responsibilities outlined in this section.

Task 2.3: Developing a conceptual framework for the training program and delivery of follow-technical assistance to the participants.

This component of the project will be shared between DREDF staff, ILRU staff, and selected consultants. The conceptual framework that will be prepared and submitted for approval by EEOC during the first eight weeks of the project will be shaped to some degree by results of interviews and the literature review to be conducted as required under Task 1.1 and Task 2.1, respectively, but will include several key elements in addition to those identified in the application materials. These include:

- Empowerment of people with disabilities through instructional and follow-up services that reinforce positive self images and build self esteem.
- Tailoring of instructional and follow-up services to the levels of interest and abilities of participants so that persons with all types of disabilities can participate in ADA implementation activities regardless of limitations in physical or cognitive functional abilities.
- Use of appropriate technology and communication methods in instructional and follow-up activities so that access to information and support is maximized.
- Mutual assessment of project feasibility and negotiation on best methods for achieving desired project outcomes.
- Adherence to commitments on the parts of both participants and project staff and consultants in carrying out specific activities identified by participants in conjunction with projects.
- Clear identification of measurable outcomes to be realized for each project initiated.
- Pre-determined timelines for attaining project milestones.
- Procedures for requesting assistance in dealing with implementation problems or with difficulties in adhering to pre-determined timelines.
- Potential fall-back goals and implementing activities that can be pursued toward some alternative outcome(s) if the original goals become unattainable.
- Recognition of progress made by each participant for the purpose of encouraging additional effort and promoting growth of activities designed to achieve optimal outcomes in implementation of ADA.

The primary responsibility for tracking and documentation of follow-up activities will be assumed by Alan Meyer at ILRU. He will prepare initial drafts of reporting procedures and documentation forms and will provide them to DREDF training staff for review and comment before finalizing them for submission to EEOC for approval. He will also prepare a technical assistance directory, indicating experts of first choice to be called upon in addressing specific problems encountered by training participants. In most cases, these experts will include persons associated with the proposed project, such as DREDF's designated staff on legal issues, BFE's designated staff on design and construction issues, and Peter Maida on alternative dispute resolution issues. However, Meyer will have full access to ILRU's Technical Assistants Directory

and Technical Assistance Resource Directory, which are updated regularly, and these will be used as needed to address technical assistance issues that are outside of the areas of expertise of DREDF staff and participating consultants and contractors. Also, Meyer will be able to draw upon ILRU staff in providing technical assistance on organizational issues and on issues of project design and follow-through that may arise. ILRU staff--particularly Laurel Richards and Quentin Smith--have extensive experience in carrying out follow-up projects with trainees and will provide support as necessary to assure optimal outcomes from these project efforts.

In addition DREDF plans to undertake five on-site technical assistance visits. Three visits are planned to training sites and two visits are planned to locations to be determined by technical assistance staff during the follow-up portion of the project. Three follow-up technical assistance visits are planned by key staff from the Council of Better Business Bureaus. These visits have been planned as a means of providing face-to-face assistance to trainees in a variety of potential contexts to be determined by key staff as the need arises.

Finally, Meyer will confer with designated staff of ILRU and DREDF to identify results from participant projects that have policy implications regarding implementation of ADA, or that require development of technical assistance resources in addition to those identified for initial project activities. This is one of the most important aspects of the proposed participant projects and it will receive the attention of ILRU staff, including Lex Frieden, as well as key staff and consultants at DREDF. Reports on participant project outcomes will be carefully reviewed, with particular attention to any barriers or problems identified that prevented participants from reaching targeted goals. In cases where the nature of the problems or barriers are not obvious, Meyer or another ILRU staff member will contact the participant completing the report to obtain additional details that might help define the policy issue or technical assistance need to be addressed. In each of these cases, all relevant information will be provided to DREDF project staff and to EEOC in specified reporting formats.

Task 2.4: Develop the five-day Phase One training curriculum and the six-day Phase Two training curriculum and plan for conducting follow-up technical assistance.

The development of the training curriculum on Titles I, II, and III of the ADA and alternative dispute resolution methods for Phase I trainings, and Title I, and advanced alternative dispute resolution for Phase II trainings will involve a number of steps to be carried out primarily by DREDF staff with consulting staff providing input on discrete issues. Primary curriculum development responsibility will rest with Marilyn Golden, Marian Blackwell-Stratton, Elizabeth Savage, Arlene Mayerson, and Mary Lou Breslin. These individuals will review the current two and one-half day ADA training curriculum being used by DREDF and determine how it can be expanded to accommodate more in-depth information on design and architectural specifications and where to position the new information on alternative dispute resolution. In addition, they will assess the current depth and sequencing of topics covered in the training program and establish priorities on the topics that are in greatest need of additional attention through the instructional program. Also an assessment will be made of instructional processes that are currently used to determine if they are adequate in

imparting knowledge and fostering skill development needed to effectively impart information on ADA.

While alternative dispute resolution techniques are well-established and successfully used in many settings, their use in settling disputes arising from the ADA presents a challenge because of the inherent conflict in the role of the person with a disability who is also acting as mediator. Although negotiation skills are taught as a part of DREDF and ILRU's core training on substantive law and independent living respectively, training on ADR methods presents new challenges. Our trainees will by definition be people with disabilities who are personally and professionally committed to the goals of the disability rights movement and knowledgeable about the technical elements of the statute under which the disputes will arise. Those factors set them apart from the neutral, process-oriented traditional dispute resolution model. Also, with portions of the ADA being subject to interpretation based on individual circumstance, the solutions to disputes will create the body of experience which will become the community standard for interpretation of the ADA short of those defined by litigation.

In recognition of the need for a model of alternative dispute resolution tailored to this unique set of circumstances, DREDF and ILRU have enlisted the Council of Better Business Bureaus, who are experts in ADR and can take a crucial and issue-neutral leadership role in promoting the use of ADR techniques in the ADA.

Their first role will be to organize a symposium to help develop the ADR piece of the training curriculum. They will convene a two-day meeting in Washington, D.C. calling together a carefully selected group which includes representatives of the disability community, the ADR community, businesses, selected ILRU and DREDF staff, CBBB members and staff. The CBBB will have drafted a curriculum and will have distributed it to the participants as the basis for the meeting agenda. The product of the meeting will be synthesized by the CBBB staff, distributed to participants for comment, and finalized in conjunction with DREDF and ILRU staff. The final draft will be presented to EEOC as a part of the complete training curriculum for approval.

The other piece of curriculum development that will be occurring concurrent with the steps indicated above, will involve content and process decisions on access specifications to be covered by Ron Mace. Mace will develop the initial content descriptions and instructional process plans based on his previous experience in providing Section 504 training and on new information required as part of ADA and its implementing regulations, and in accordance with time and sequencing specifications to be provided by DREDF training staff. A mutual decision will be reached on the amount of time and attention to be devoted specifically to design specification content and process skill development in Phase One training, and on how to weave additional information on this topic throughout the remainder of the training program. The initial Phase One curriculum outline will reflect this determination. A preliminary outline for design content in Phase Two will also be prepared, but it will not be finalized until after testing and evaluation of Phase One training has been completed.

The final activity under this task will involve merging of the curriculum material and project follow-up activities, to be developed primarily by staff at ILRU working closely with DREDF staff, into the

conceptual framework that will be developed in accordance with Task 2.3. The goal of this effort will be a DREDF-managed training project that provides baseline information to participants on ADA and its provisions and methods for using ADA effectively, followed by a smooth hand-off to ILRU staff who will be responsible for assisting in development of project plans for each participant and for putting in place the monitoring system to be used to determine that projects are staying on track.

Task 2.5: Prepare a draft report on activities undertaken and results realized in addressing Task 2, including:

- a brief description of methods, procedures, and activities used in addressing the task requirements;
- a summary of the results realized from these efforts;
- a draft of the conceptual model clearly indicating the integration of training and follow-up, follow-along activities;
- a draft of the five-day training curriculum for Phase One workshops and a preliminary draft of the curriculum outline for Phase Two workshops and follow-up activities, along with copies of educational materials to be used in training;
- a concise bibliography and references used in the developmental effort; and
- the names, addresses, and curricula vitae and professional references for each professional trainer, along with the topic areas for which each trainer will be responsible.

This draft report will be prepared primarily by Marilyn Golden and Marian Blackwell-Stratton at DREDF and Alan Meyer at ILRU, with input from appropriate staff of both organizations and consultants/contractors as necessary. The draft report will be completed by the end of project week eight.

Task 2.6: Submit the draft report to the EEOC Project Officer in accordance with requirements in the application materials, and requesting written comments and revisions by the end of week nine.

Marilyn Golden will be responsible for submission of the integrated report on training and follow-up activities. The draft report will be submitted by the end of project week eight.

Task 2.7: Incorporate changes in the conceptual model, the Phase One workshops plans, preliminary plans for Phase Two workshops, and follow-up activities in accordance with recommendations from the EEOC Project Officer, and submit the revised materials to the EEOC project Officer for approval.

This will be accomplished primarily by Marilyn Golden and Marian Blackwell-Stratton with appropriate input from Alan Meyer, other ILRU staff, and selected consultants/contractors. The revised report will be submitted by the end of project week ten.

Task 3: Develop a detailed "Logistical Plan" for arranging and conducting the workshops and follow-up technical assistance to ensure successful implementation of participant projects and develop a methodology and plan for conducting ongoing evaluations of the workshops and technical assistance.

The detailed logistical plan will be developed primarily by the Alan Meyer and ILRU staff, particularly Laurel Richards, Quentin Smith, and Lex Frieden, working in close cooperation with Marilyn Golden and Marian Blackwell-Stratton at DREDF. Part of the logistics for the project involve arrangements for on-site hourly-paid help to be identified and secured with the assistance of NCIL. In order to assure that these individuals are fully prepared to carry out the work they will be doing at each site, detailed job descriptions will be prepared and made available to them at least one week in advance. These will indicate the timing of all activities to be carried out at the training sites and which person (i.e., DREDF, ILRU, or local hourly-paid staff) is responsible for the task. These descriptions will also indicate reporting lines and who has authority for making decisions in the event that problems occur or revisions in plans need to be made. Preparing final copies of detailed job descriptions and associated work protocols will be the responsibility of Alan Meyer and ILRU staff, with Meyer assuming responsibility for on-site supervision of support staff.

The overall logistical plan for training programs and follow-up activities will include:

- the methodology and criteria to be used in selection of the 400 persons with disabilities who will participate in Phase One workshops and receive follow-up technical assistance;
- the methodology and criteria for selection of the 100 participants from the Phase One workshops who will participate in the Phase Two workshops and receive follow-up technical assistance;
- the methodology for modifying the workshops and follow-up technical assistance based upon ongoing evaluation;
- the procedures and methods for providing necessary support and logistics for conducting the workshops;
- the procedures and methods for providing necessary support and logistics for conducting follow-up technical assistance;
- resources to be used in staffing the workshops; and
- specific dates on which each workshop will be carried out.

Although Alan Meyer and the ILRU staff will have primary responsibility for preparing the logistical plan, DREDF staff will be principally involved in making decisions about workshop timing. Also, DREDF staff will be asked to assist with participant selection to provide an additional measure of insurance that participants are selected in accordance with requirements specified by EEOC. Considerations to be used in the selection process include recruiting both men and women:

- with varying types of disabling conditions, including mobility

impairment, sensory impairment, cognitive impairment, and mental health impairment, among others;

- representing various racial and ethnic groups, including individuals with limited English-speaking abilities; and
- who represent the adult age continuum , from young adults to persons age 65 and older.

Task 3.1: Develop a plan (including sites and dates), subject to approval of the EEOC Project Officer, which specifies the methodology and criteria for selection of persons with disabilities who will participate--subject to review and approval by the EEOC Project Officer--in the workshops and receive follow-up technical assistance.

This plan will developed by Alan Meyer and staff of ILRU, with significant input from DREDF. It will include the following:

- plans for achieving participation of persons with disabilities representative of the population protected by ADA;
- plans for guaranteeing the participation of a significant number of persons with disabilities covered by the ADA who are members of minority groups;
- plans for identifying and recruiting persons with disabilities who evidence capabilities and commitment to develop and implement projects and activities designed to improve compliance with ADA regulations; and
- procedures and criteria for selecting persons with disabilities for participation in the training workshops and follow-up assistance and receiving clearance from the EEOC.

It should be noted here, that plans and procedures developed to address this task will include descriptions of contacts to be made with disability groups (e.g., United Cerebral Palsy, Associations for Retarded Citizens, Paralyzed Veterans of America) nationally and locally, groups representing minority citizens (e.g., LULAC, NAACP, Chinese-American Citizen Alliances), and groups representing younger and older persons with disabilities (e.g., Association for Children and Adults with Learning Disabilities, American Association of Retired Persons), and how those contacts will be employed in the recruitment process.

These plans and procedures will also include a description of methods to be used in determining if individuals evidence capabilities and commitment to develop and implement activities designed to improve compliance with ADA regulations. These methods will certainly include solicitation of recommendations from leaders in the disability community, but efforts will also be undertaken to explore less obvious means of making such identifications, including making contacts through local school districts and churches and contacting mayor's offices and other governmental and regulatory agencies to determine if there are individuals in the community who have been actively seeking information on access issues or on other matters suggesting interest in disability issues. This less obvious approach to seeking participants is intended to identify people who may not be known by leaders in

the disability community, but who have the potential for assuming leadership responsibilities.

Task 3.3: Identify and assess the feasibility of sites and dates for conducting the Phase One and Phase Two workshops.

Activities under this task area will also be primarily the responsibility of Alan Meyer and ILRU staff, assisted by June Kailes and a person to be named by NCIL, and by staff at independent living centers in the cities targeted for training. Activities to be carried out under this task area include:

- development of plans for publicizing and promoting the workshops for the purpose of identifying and enrolling the most qualified participants, as well as for garnering support from local groups and organizations;
- characterization of the geographic and population parameters of the targeted areas and resources available to support training and follow-up activities;
- assessment of the availability of required support facilities, equipment, and personnel to accommodate the training needs of specific groups identified in Task 3.1;
- assessment of the extent of support that can be expected from local groups and organizations that will be called upon to assist with planning and arranging of workshops; and
- assessment of the feasibility and cost-effectiveness of holding all or some of the workshops at a centrally located site.

In order to truly gauge the degree of support for each workshop available through local resources, significant assistance will be required from members of the local communities. In order to provide some assurance that such assistance will be available, the involvement of NCIL and of local independent living centers will be used. Staff of local independent living centers, and particularly the information and referral staff, will be called upon to assist in characterization and assessment of the target communities, particularly with regard to resources available. Funds have been budgeted to purchase this assistance from staff of participating centers.

As regards the assessment of the feasibility and cost-effectiveness of holding all or some of the training at a centrally located site, one caveat based on prior experience offering similar training should be offered. Although the feasibility of such an approach will be considered, it is DREDF's staff experience that pursuing such a course will severely limit access to the training. Since few stipends will be offered to cover airfare and hotel, and many qualified people with disabilities live on fixed incomes, offering several programs in a centralized site is likely to exclude many people from attending programs.

During its experience with Section 504 training, DREDF documented that many people participating in training drove to the training sites or relied on other ground transportation to bring them to the training sites. If trainees must bring attendants, it will be less expensive to drive rather than fly. If

several trainings are held in a centralized site, people in other parts of the country may be discouraged from participating and it may be difficult to fill training sessions. Although such factors as cost and possible recruitment areas will be considered before making a final decision on this consideration, a very powerful argument would have to be made in favor of centralized training programs in order for this approach to be pursued. For these reasons five locations where trainings will be conducted have been tentatively identified. An explanation for the selection of the proposed tentative sites is found at Task 5.1.

Task 3.4: Develop a methodology for evaluating and revising the workshops (including sites and dates) and follow-up technical assistance.

Activities under this task area will be primarily the responsibility of Quentin Smith at ILRU, with assistance provided by Peg Nosek, Ph.D., Laurel Richards, and Alan Meyer. Smith is very experienced in project evaluation and has served in evaluation roles in number of projects at ILRU and at Baylor College of Medicine. DREDF legal staff will review substantive portions of all evaluation instruments to assure that reporting to EEOC reflects accurate level of substantive feedback. Activities to be undertaken in addressing this task area include developing the methodologies and instrumentation for:

- evaluating the effectiveness of the approved conceptual model, workshop curriculum, and logistical plan for the workshops and follow-up technical assistance;
- identifying the weaknesses in methods and materials used in the workshops;
- identifying weaknesses in logistical plans;
- identifying weaknesses in the provision and content of the follow-up technical assistance; and
- revising the methods and/or materials to reduce or eliminate apparent weaknesses.

It should be emphasized that one of the primary goals of the evaluation activities to be carried out for this project will be to prepare an examination that can be given to people participating in training for the purpose of assessing their knowledge of ADA and its provisions and for certifying them to serve as "experts" in conveying that knowledge to others in the disability, business, and general communities.

It is envisioned that at least two levels of certification might be developed--a basic certification indicating general knowledge of ADA and its provisions and an advanced certification indicating that the individual has some level of skills in organizing and delivering services designed to promote implementation of ADA. The former certification might be provided to persons successfully completing Phase One training, and who would then be available to provide general information on ADA and its regulations and might suggest methods for resolving disputes relating to questions of ADA compliance. The latter, or advanced certification would be provided to people completing Phase Two training, who would then be available to assist with more extensive educational and organizational efforts relative to ADA.

Development of tests to be used in the certification process will focus on identifying "need to know" test items versus "good to know" test items and determining how many of each types of item is required in order to assure good or excellent understanding of ADA and implementing regulations. Smith and other staff of ILRU will work closely with DREDF staff in developing and pilot testing this certification process, with the goal of having at least a provisional certification examination ready for use at the time of the first training workshop. This work will be facilitated by efforts currently underway at ILRU to assess knowledge levels of independent living center staff with respect to ADA and its provisions.

Other evaluation activities will be undertaken to determine perceptions of quality of training efforts by both faculty and participants in training programs. These perceptions will be determined using questions about content, presenter knowledge, appropriateness of instructional methods, quality of instructional materials, and adequacy of training facilities that can be answered using Likert-type scales. They will also be determined through open-ended questions that permit the trainee/faculty member to identify the parameters by which he or she is evaluating the quality of the training experience. Answers to open-ended questions will be summarized in narrative format and reported to the EEOC as part of the evaluation report.

Similar evaluations of the quality of technical assistance and follow-up support will be carried out. These will be done by periodically sending trainees follow-up rating scales and questionnaires to complete. These will request information on the quality and timeliness of technical assistance provided and on problems encountered in obtaining technical assistance from project staff or consultants or from other sources recommended. In cases where there is persistent poor response to evaluation information requests, participants will be contacted by ILRU evaluation staff via telephone to determine the reasons for lack of response. Efforts will be made at this time to obtain evaluations from people contacted, and any evaluative data provided by participants will be reported to EEOC at an appropriate reporting time.

In addition, at least ten percent (40 people) of all participants to be randomly selected will be contact by telephone at the end of the first year to obtain information on perceptions of the quality of the training, adequacy of follow-up technical assistance and support, and problems experienced will be conducted to obtain a more complete picture of the quality of the first-year experience. In the event that more than eight (20 percent) of the people contacted by telephone express dissatisfaction with the program, an additional twenty people will be randomly selected and contacted to determine if there are major problems with the training or with technical assistance or follow-up support that should be addressed as the program continues.

All information generated through the various evaluation activities described will be used to refine and strengthen the training program. ILRU training and evaluation staff are very experienced in using evaluation feedback to improve training programs, as are the training and technical assistance staff of DREDF. Strengthening of training activities will be an ongoing part of the program over the first year of activity and option year if funding is received for the additional activities.

Task 3.5: Prepare a draft report on the plan to used in addressing Tasks 3.1-3.4 for submission to the EEOC Project Officer, with a request for

recommendations and comments.

Preparation of the draft evaluation plan will be primarily the responsibility of Quentin Smith, Peg Nosek, Laurel Richards, and Alan Meyer at ILRU. They will prepare the evaluation with substantive and frequent input and from training and technical assistance staff at DREDF. Draft versions of evaluation instruments and protocols will be provided to DREDF via FAX throughout the developmental process, and the final draft will be one that is mutually satisfactory to the training and technical assistance staff of DREDF, as well as to the ILRU evaluation staff. The draft evaluation plan and instrumentation will be provided to the EEOC Project Officer by the end of project week nine.

Task 3.6: Revise the draft evaluation plan and instruments in accordance with recommendations from the EEOC Project Officer, and submit the revised report to the EEOC Project Officer for approval.

Revisions to the evaluation plan and instruments will be made by Quentin Smith and ILRU project staff and reviewed with DREDF training and technical assistance staff before being sent to the EEOC Project Officer. The revised report will be delivered to the EEOC Project Officer by the end of project week eleven.

Task 4: Develop a methodology and tool to measure, track, and report the outcomes and results of this contract on an "as needed" and regular basis with the administrative reports and the Final Report.

Preparing the methodology to be used in tracking progress, measuring outcomes, and assessing results realized through this contract will be primarily the responsibility of Quentin Smith, Peg Nosek, Laurel Richards, and Alan Meyer at ILRU. These individuals have experience in this area, having operated RSA-funded management training programs that have similar "off-site" components to those required for this contract. The methodology to be used in addressing this task area will include collection of data in at least the areas indicated in the application materials, which are:

- the numbers of people trained;
- numbers of materials and information referrals and resources provided;
- the cost savings, number of participants and/or employees and employers benefitted and the overall actual or potential cost-effectiveness of this contract;
- other items that will document the compliance and "change" that occurred as a result of this contract; and
- the services/activities performed by the participants pursuant to the written agreement as identified in the Scope of Work.

Because of ILRU's previous experience in carrying out similar data collection activities and its access to hardware, software, and support personnel, completing the data collection activities indicated generally presents few problems. Collection of data on activities carried out by participants can be handled in a variety of ways, including "paper and pencil"

reporting forms, telephone reports using a standardized format, and electronic reporting using existing computer networks. The first of these methods "paper and pencil" reporting can be handled quite expeditiously using forms requesting information on numbers and characteristics of people trained by DREDF and its partners and numbers and types of activities carried out by those people after training is provided. This is not to say that such reporting is easy to do, or that securing good response rates from participants after training are completed will be a easy task. Considerable effort will go into following up with non-respondents to obtain data on post-training participant projects. ILRU staff are experienced in carrying out such follow-up tasks.

In order to accommodate individuals who may have difficulty completing paper and pencil reports on activities, telephone reporting will be an option made available to participants. Telephone reporting on post-training activities can be set up so that one of ILRU's data collection staff is trained in requesting information on project activities using standardized protocols and reporting forms and collects quantitative data during scheduled call-in times. This can be followed up by a call from the evaluation specialist or logistical coordinator to obtain further details on specific aspects of the follow-up activities and to secure information offering evident of the quality of activities. Exact process to be used in telephone reporting will be determined based on the specific type of project undertaken by each participant, but it is expected that four of five different reporting protocols can be developed that will cover most, if not all, of the projects proposed by participants.

The use of electronic reporting will offer both reasonable accommodation and convenience to participants. There are number of computer networks available for use at low cost, including SERIES and WIDNET, and these can be accessed for reporting purposes. Reporting could be managed this way by sending reporting forms via electronic mail to participants who have access to these systems. Participants would then fill in the information requested and return the completed form via electronic mail. This reporting format offers convenience to people who have computers in their homes or offices and accommodates people with physical disabilities who use computers as primary communication tools and people with hearing impairment who may have difficulty with telephone reporting. Communication via TTY/TDD will also be used in the reporting process, but given the one-line display capacities of many TTY/TDD devices, there are problems in trying to gather substantial amounts of quantitative or qualitative data using such devices. In cases where TTY/TDD communication is used in evaluation data gathering, it will also be accompanied by either written or electronic data collection activities.

Two aspects of this evaluation component are somewhat difficult to address and need to be approached with some creativity. The first of these is the requirement to document "change." Changes are sometimes not obvious and may not be immediately evident from outside observation. Although some compliance activities, such as installing ramps in a business to accommodate an employee who uses a wheelchair, will be immediately evident and documentable, other changes, primarily those dealing with attitudes and beliefs, are much more difficult to document. ILRU staff, because of their long history of working in independent living, have extensive experience with ethnographic data collection methods to assess impacts that may be difficult to quantify. Assessment of change in businesses and in communities in general

will be gathered through collection of anecdotal as well as quantitative data. These findings will be reported primarily in narrative form.

The other somewhat difficult aspect of the evaluation component relates to making determinations of cost savings and assessing potential cost-effectiveness. Making such determinations requires a very clear understanding of pre-intervention cost factors and effective ways of measuring changes in costs after an intervention--in this case the training provided to people with disabilities. Estimates of cost-related data are made even more difficult in light of the relatively short time frame for this project--two years maximum, with less than 18 months to measure post-intervention change for many participants. Notwithstanding these difficulties, efforts will be made to assess the degree to which benefits to employees and employers have financial implications and to estimate the amount of cost savings realized from enhanced working opportunities for people with disabilities, greater market potential for businesses that improve accessibility, and reduced operating costs associated with avoiding litigation might have resulted from non-compliance. These estimates, and the basis for calculating estimates will be included in project reports.

Task 4.1: Submit a draft of the report on evaluation methodology and tools to the EEOC Project Officer, requesting comments and recommendations within one week.

This report will be prepared primarily by Quentin Smith, Peg Nosek, and Lex Frieden at ILRU. It will be reviewed by DREDF staff prior to submission to EEOC and will be provided to the EEOC Project Officer by the end of week 13.

Task 4.2: Submit a revised report on the evaluation methods and instrumentation in accordance with revisions suggested by the EEOC Project Officer.

Revisions will be handled primarily by ILRU staff, with input from DREDF staff, and the revised report will be submitted to the EEOC Project Officer for final approval by the end of week 15.

Task 5: Conduct the Phase One Workshops and Follow-up Technical Assistance.

Once revised plans and materials have been approved by the EEOC Project Officer, offering of the Phase One workshops will begin. It is expected that the first workshop will be conducted in project week 17 or 18, and that Phase One workshops will continue to be offered at roughly four week intervals through approximately project week 34.

Task 5.1: Conduct the Phase One workshops and provide follow-up assistance according to plans discussed under previous task areas.

At present, plans call for offering Phase One workshops in five different cities--Washington, DC, San Francisco, CA, Houston, TX, St. Louis, MO, and Denver, CO. These cities have been initially targeted because of the access they provide to large population bases in diverse parts of the country and because of the resources available in city to support the training activities. The sequence for training in each city will not be firmly established until after some checking has been done to determine the

availability of hotel space and to assure that major meetings that might attract the same target audience are not being offered at the times under consideration. It is almost certain that the first of the Phase One workshops will be held in Washington, DC, with San Francisco or Houston being likely choices for the second meeting. Using this approach will allow for "bugs" to be worked out in locations where the greatest amount of support resources are available (i.e., an office of DREDF or ILRU).

Although the final version of the training for Phase One will not be determined until shortly before the training is scheduled, it is expected that about 60 to 70 percent of the training program will be targeted to the substantive provisions of ADA, with 15 to 25 percent targeted to alternative dispute resolution techniques, and 10 to 20 percent targeted to design and construction specification information. The provision of substantive training on ADA will be the responsibility of ADA staff and consultants, the provision of instruction on alternative dispute resolution will be the responsibility of Council of Better Businesses staff, and the provision of training on design and construction specifications will be the responsibility of Barrier Free Environments staff. ILRU staff will be responsible for logistical arrangements, provision of instructional materials, gathering evaluation data, and supervising local support staff who will be hired to help with the logistical issues.

Once workshops have been completed, the development of project plans by workshop participants will be guided by staff at ILRU. Each participant will be expected to provide a plan for how he or she is going to impart knowledge about ADA to at least 50 people with disabilities and to at least 30 employers, business people, or representatives of other covered entities. ILRU staff will assist these individuals through technical assistance on setting up community meetings, making presentations, getting on local radio and television shows, and using other media to convey information on ADA. The CBBB will provide assistance and support to participants in identifying local Bureau members for the purpose of establishing relationships and developing follow-up training and technical assistance projects. In addition ILRU staff will review materials to be used by participants to assure accuracy and clarity and will assist in locating other materials that might be used by participants in their dissemination efforts. Questions of a technical or legal nature will be referred to DREDF or an appropriate consultant. ILRU staff will also document activities carried out by participants in accordance with EEOC stated requirements.

Task 5.2: Evaluate the Phase One workshops and follow-up technical assistance and revise materials or methods as necessary to enhance outcomes.

Evaluation of Phase One workshops and follow-up activities will be primarily the responsibility of Quentin Smith and other ILRU staff, including Peg Nosek, Alan Meyer, Laurel Richards and Laurie Gerken. As discussed under Task 3.4, the evaluation will examine both knowledge and skill levels of participants, but also satisfaction with and perceived quality of the training program and follow-up activities. Once evaluation data has been gathered, it will be analyzed by ILRU staff, and results will be provided to DREDF staff and other project partners, along with recommendations from ILRU evaluation staff on how the training or follow-up activities might be further refined to improve outcomes. Determinations on the need for and types of further refinement needed to improve project outcomes will be made jointly by DREDF

staff, ILRU staff, and other appropriate partners in the project. The EEOC Project Officer will be notified of the proposed changes before the curriculum is prepared for use at the next scheduled training. These activities will be continued over the duration of the project, and results will be provided to the EEOC Project Officer at intervals stipulated in the application materials, and at other times as appropriate to assure timely receipt of information.

Task 6: Conduct the Phase Two workshops and follow-up technical assistance.

While Phase One workshops are underway, staff of both DREDF and ILRU will be preparing recommendations for revisions in the preliminary Phase Two workshop curriculum and supporting materials based upon Phase One results and newly identified needs. Recommended revisions will be submitted to the EEOC Project Officer prior to initiation of the Phase Two workshops.

Task 6.1: Conduct the Phase Two Workshops and follow-up technical assistance.

The Phase Two workshops will be conducted using the approved curriculum in accordance with EEOC requirements. It is expected that the first of the two workshops for 50 participants from the Phase One workshops, selected for their demonstrated commitment and ability to promote ADA implementation as evidenced by performance in Phase One workshops and success in follow-up activities, will be held in San Francisco in project week 37 or 38. As in the case of Phase One workshops, the substantive training on ADA will be handled primarily by DREDF staff with support from staff of BFE. However, Phase Two workshops will involve more training in negotiating skills and in alternative dispute resolution techniques than did Phase One workshops. They will also focus more heavily on techniques for assisting employers in understanding options available in making reasonable accommodations for people with disabilities and encouraging businesses and other covered entities to enhance accessibility through physical or procedural modifications. The second of the Phase Two workshops will be held in the Washington, D.C. area most likely in week 41 or 42, after any additional refinements in the curriculum are made as a result of the previous offering.

As with Phase One workshops, ILRU staff will manage logistical arrangements for Phase Two workshops, prepare instructional materials, supervise on-site support staff, and gather evaluation data. ILRU staff will also be primarily responsible for managing follow-up technical assistance with Phase Two participants. The technical assistance activities provided to Phase Two participants will focus more heavily on "how to" activities designed to facilitate their effective interventions in the community. In this regard, ILRU staff will call upon a wide range of technical assistance resources already identified and augmented over the course of this project. People requiring technical assistance on the substantive issues of ADA and its legal interpretation will continue to be referred to DREDF, and people wanting similar assistance with ADR will be referred to the ADR Division of CBBB. The CBBB will also continue to provide follow-up support to participants to assist them in establishing relationships with local members of the Bureau and to facilitate follow-up projects with businesses. Other referrals will be made as necessary to obtain the best support available for activities to be undertaken by Phase Two participants.

Task 6.2: As in the case of Phase One activities, Phase Two activities

will be fully evaluated, with revisions made as necessary to improve Phase Two outcomes. The evaluation activities will be handled primarily by ILRU staff, and will include both pre- and post-testing for certification of competence on ADA-related issues and assessments of participant perceptions of quality of the training and follow-up support services. As part of the evaluation of the Phase Two activities, staff at ILRU will undertake attempts to contact employers and others in the communities from which participants are selected to determine if they have been made more aware of ADA and its provisions and whether they have taken any steps to improve accessibility as a result of heightened awareness gained through their interactions with persons participating in the training. The exact mechanisms for carrying out follow-up with employers and others in participants' communities will be determined during the initial phases of the project, taking into account issues of confidentiality and sensitivity to problems that might arise in cases where such follow-up might be perceived as intrusive. The goal of these efforts will be collect adequate information to estimate the level of impact without creating a "backlash" against ADA implementation efforts in the community.

Intensive follow-up support of both Phase One and Phase Two activities will be maintained over the duration of the first project year and throughout the option year if funding is obtained to support second-year activities. If no funding is obtained for the option year, then follow-support will be continued at levels that are feasible with support available through other sources. At present, it is difficult to estimate the level of support that might be provided without second year funding, but it would be substantially less than could be provided with such funding.

Task 7: Prepare and submit seven administrative reports at four-week intervals throughout the period covered by Task 5 and Task 6.

Throughout the period during which workshops are offered, ILRU staff will gather evaluation data on the workshops and will submit reports in accordance with stated requirements in the application package. Quentin Smith will assume primary responsibility for report preparation, with assistance provided by appropriate ILRU staff. DREDF staff and selected consultants will be asked to review reports and recommend revisions before they are submitted. Reports, to be submitted in weeks 19, 23, 27, 31, 35, 39, and 43, will cover at minimum:

- a description of the principal accomplishments of each workshop, including a summary of participant evaluations;
- problems encountered in workshops and status of previously reported problems;
- plans for revising the workshops based on evaluation data; and
- a progress report on the types of follow-up assistance given, the progress of each participant, and the major accomplishments. Specifically this report will include:
 1. numbers of participants in workshops offered (a) since the previous report, and (b) cumulatively;

2. a description of participants, projects, and activities underway (a) for projects started since the previous report, and (b) cumulatively;
 3. results accomplished for each project or activity described, including anecdotal information on actions taken by employers and covered entities to comply with Titles I, II, and III of the ADA (a) for projects started since the previous report, and (b) cumulatively;
 4. activities accomplished that will lead to results (specifically activities targeted to specific problems, certain types of employers or other business entities, etc.) and documentation and descriptions of results from earlier activities (a) for projects started since previous report, and (b) cumulatively;
 5. documentation of numbers of persons with disabilities or employers or other covered entities affected by results (a) for projects undertaken since previous report, and (b) cumulatively;
 6. potential number of people with disabilities or employers and other covered entities affected by results (a) for projects undertaken since previous report, and (b) cumulatively;
 7. documented number of technical assistance requests (a) to date, and (b) cumulatively;
 8. documented number of responses to technical assistance requests (a) to date, and (b) cumulatively; and
 9. other results and outcomes as described in Task 4.
- status of adherence to proposed schedules;
 - proposed modifications to approved plans; and
 - effort planned for next reporting period.

Task 8: Submit to the EEOC Project Officer a final report for the project which shall consist of:

- a statement of purposes and objectives;
- a summary of the conceptual framework;
- a description and activities for delivery of the workshops and follow-up technical assistance;
- a detailed discussion of outcomes of follow-up technical assistance activities (accomplishments and failures) by type and size of covered entity, with specification of activities as follows:
 1. tabular presentations of cumulative data from numbers 1-6 of the administrative reports; and

2. anecdotal information of changes made by covered entities to come into compliance as a result of technical assistance, information referral or disputes resolved.
- specific proposals for improving the technical assistance programs;
 - five copies of the Task 4 cumulative report and ten copies of the final report; and
 - all training and technical assistance materials, with guidelines and supplementary documentation attached as appendices to the materials.

Task 8.1: Submit a draft of the final report described above to the EEOC Project Officer, requesting return with comments and recommendations within one week.

ILRU staff will assume lead responsibility in preparation of the draft, with substantial input from DREDF staff and selected consultants. This draft will be submitted by project week 49.

Task 8.2: Submit a revised version of the report, incorporating suggested changes, to the EEOC Project Officer for final approval.

ILRU staff will assume the lead role in modifying the draft report in accordance with EEOC recommendations and will submit the revised draft by project week 52.

OPTION YEAR ONE ACTIVITIES

Specifics of the activities to be carried out in the Option Year will not be determined until experience with the first-year training and technical assistance has been evaluated. It is expected, however, that year two activities will continue to be split between DREDF and ILRU staff, with DREDF staff assuming responsibility for updating the training content of training and strengthening the technical assistance component relative to the substantive aspects of ADA and alternative dispute resolution, and ILRU staff being responsible for preparing revised training materials, coordinating technical assistance services, and carrying out evaluation activities. At minimum, the following tasks will be completed during the option year.

Task 1: Update training materials and technical assistance.

Training materials will be updated to incorporate information from documents (e.g., EEOC and DOJ policy guidance and technical assistance manuals) issued since preparation of training materials and curriculum for the Phase One and Phase Two workshops. In completing these tasks, DREDF staff will review materials and identify new information for incorporation into the curricula, and ILRU staff will manage materials instructional and technical assistance materials preparation. In addressing this task requirement, the following activities will be completed.

Task 1.1: Review the administrative reports and final report from year-one activities and determine if there are specific proposals to improve the technical assistance and training materials.

Task 1.2: Review training and technical assistance materials that are currently available and that have been issued since preparation of materials for the Phase One and Phase Two workshops.

Task 1.3: Determine which materials should be included in refresher training materials for the Phase One and Phase Two workshop participants; and

Task 1.4: Update and/or revise training materials and technical assistance to incorporate relevant materials and information.

Task 2: Provide refresher training for Phase One and Phase Two participants.

Using updated training materials and appropriate technical assistance to facilitate use of the materials, refresher training will be provided to Phase One and Phase Two participants. In addressing this task area, the following activities will be completed.

Task 2.1: Assess the current level of knowledge of the Phase One and Phase Two participants;

NOTE: This is to be accomplished through administration of assessment instruments designed to determine levels of retention of previously presented ADA-related information and acquisition of new ADA-related knowledge through project-related technical assistance or other sources. ILRU staff will be primarily responsible for administration of the instrument, which will be revised versions of the assessment instruments developed for year one certification purposes.

Task 2.2: Identify specific training needs of Phase One and Phase Two participants, respectively, based on results of assessments.

Task 2.3: Disseminate materials prepared pursuant to the Task 1 updating activities.

Task 2.4: Prepare a report to the EEOC Project Officer for review and approval of the Task 1 and Task 2.1-2.3 activities that includes:

- a bibliography of materials reviewed;
- updated and revised support materials; and
- assessments tools used to evaluate knowledge of participants.

Task 2.5: Submit by the end of week four of year two the draft report described in Task 2.4 to the EEOC Project Officer, requesting return of comments and suggestions for revisions within one week.

Task 2.6: Within two weeks of submission of the Task 2.5 draft report, incorporate revisions suggested by the EEOC Project Officer, and submit a copy of the revised report for final approval of the Project Officer by the end of week 6.

Task 3: Monitor and provide technical assistance to Phase One and Phase Two participants as they:

- provide training and technical assistance to people with disabilities;

- provide education and technical assistance to covered entities in their geographic areas;
- provide assistance to DOJ and EEOC district, area, and local offices to assist DOJ EEOC in enforcement of Titles I, II, and III of the ADA;
- serve as trainers, technical assistants, and resource experts;
- serve as information and referral experts; and
- provide resources for alternative dispute resolution for DOJ and EEOC headquarters, district, area, and local offices as EEOC and DOJ implement and enforce Titles I, II, and III of the ADA.

In accomplishing this task, DREDF and ILRU staff will carry out the following activities:

Task 3.1: Update and execute, subject to the approval by the EEOC Project Officer, written agreements prepared for the original project, which specify projected and/or actual activities of the participants, commensurate with EEOC's and DOJ's needs, to provide technical assistance under Titles I, II, and III of the ADA;

Task 3.2: Monitor participant progress in adhering to written agreements; and

Task 3.3: Continue follow-up activities that will include on-site assistance, information updates, refresher updates, and telephone assistance. NOTE: Approaches will be explored for the provision of on-site assistance in the most cost effective manner. For example, some on-site assistance might be provided through meetings scheduled at centralized locations in various parts of the country that could be easily accessed by people in the immediate area. In large part, the amount of on-site assistance provided will be dictated by the availability of funds to support site visits.

Task 4: Develop and establish a pool of individuals from the Phase Two participants who will serve as a subcontracting pool to be accessed by EEOC headquarters, district, area, and local offices for assistance in implementing Title I of the ADA.

Activities to address this task will be carried out primarily by ILRU staff with substantial input from DREDF staff in assessing the capabilities of individuals participating in Phase Two training. Once identified, individuals selected for this pool will be listed in ILRU's Technical Assistance Directory as designated ADA Title I experts. Specific activities to be accomplished include:

Task 4.1: Develop criteria, subject to approval by the EEOC Project Officer, to identify the pool of individuals who will be designated as ADA Title I experts, according to assessments of:

- mastery of ADA-related information;
- availability to provide expert assistance;

- geographical proximity to EEOC offices; and
- resources available to provide needed services.

Task 4.2: Designate the pool of individuals, subject to approval by the EEOC Project Officer;

Task 4.3: Develop a schedule of fees for services, subject to approval by the EEOC Project Officer, to be used by EEOC to reimburse individuals designated to serve as ADA Title I experts when such services are rendered in accordance with EEOC requests;

NOTE: Factors to be considered in developing the fee-for-service schedule will include prevailing pay rates for similarly qualified individuals providing similar services in targeted areas, costs (e.g., hiring temporary help, recovering lost service revenue) to employing organizations to free up the time of the expert, and costs of reasonable accommodations needed to deliver the service required by EEOC.

Task 4.4: Continue providing technical assistance services throughout the 52-week term of the option period.

Task 5: Prepare and submit administrative reports at four-week intervals (option year weeks 10, 14, 18, 22, 26, 30, 34, 38, and 42) throughout the conduct of Tasks 1-4 and consisting of:

1. The number of participants trained using materials dissemination methods (a) since the previous report, and (b) cumulatively.
2. Descriptions of participants' projects and activities underway.
3. Results accomplished for each project or activity described, including anecdotal information on actions taken by employers to comply with Title I of ADA (a) for projects started since the previous report, and (b) cumulatively.
4. Activities--including specified activities targeted to certain types of problems, certain types of employers, or other business entities--accomplished that will lead to results, along with documentation and descriptions of results achieved from earlier activities.
5. Documented numbers of persons with disabilities or employers affected by results (a) for projects started since previous report, and (b) cumulatively.
6. Potential numbers of people with disabilities or employers affected by results (a) for projects started since previous report, and (b) cumulatively.
7. Documented numbers and descriptions of paid consultant services provided to EEOC headquarters, district, area, and local offices (a) for services provided since previous report, and (b) cumulatively.

- status of adherence to schedules;

- proposed modifications to approved plans; and
- effort planned for next reporting period.

Task 6: Prepare and submit to the EEOC Project Officer a final report for Option Year One, consisting of a minimum:

- a description of activities for provision of the refresher training and technical assistance;
- a detailed discussion of outcomes of the follow-up technical assistance activities (accomplishments and failures) by type and size of covered entity, with specification of:
 1. cumulative data from the administrative reports reported in tabular form;
 2. changes made by covered entities to come into compliance with ADA provision, as indicated by anecdotal information indicating the influence of project activities, including technical assistance, information referral, and dispute resolution efforts;
 3. other results and outcomes as described in task descriptions outlined above.

Copies of educational materials, guidelines and supplementary documentation will be attached to reports in complying with the requirements of:

Task 6.1: Submission by the end of Option Year week 49 of a draft of the final report described above, with a request to the EEOC Project Officer to return with comments and recommendations within one week.

Task 6.2: Submission by the end of Option Year week 52 of a revised final report incorporating recommendation of the EEOC Project Officer.

b. Use of Personnel and Resources in Completing Tasks

The detailed description of project activities to be carried out during the first project year and in the option year, if funded, indicate a very effective and cost conscious use of resources. It should be pointed out that the most important resource to the successful completion of this project is the availability of personnel who are knowledgeable about ADA, disability issues in general, training and technical assistance delivery, materials preparation and distribution, and project evaluation and refinement. The previous description of activities indicates the allocation of personnel to these functions who are extremely knowledgeable and experienced in respective areas. The distribution of responsibilities between staff of DREDF and ILRU and selected other contracting organizations is intended to capitalize on the strengths of the personnel and resources in the respective organizations.

In addition to the expertise of personnel in the partner organizations, the distribution of responsibilities as indicated in the previous sections is intended to make the best use of other resources needed to successfully complete the project. For example, DREDF has extensive resource materials on

the legal aspects of ADA and its regulations and on relevant previous court findings that will be used in determining whether employers and other covered entities come into compliance with ADA. Also DREDF staff have well established contacts with legal and regulatory experts who will be called upon periodically for advice and guidance on specific issues relating to ADA implementation and information provided to individuals participating in project training and technical assistance activities.

ILRU brings to this project a well established network of consumer-controlled, community-based service agencies and an extensive data base on those providers. It also has a well-developed technical assistance program that includes existing directories of both personnel and resources that are accessed regularly in provision of technical assistance, and that offers an established mechanism for expansion of technical assistance resources specifically related to ADA. Also ILRU has the resources (i.e., production capabilities with respect to desk-top publishing, printing, transference to alternate modes for accessibility, and distribution system) needed to prepare and provide materials to the field. Finally, ILRU has the hardware and software needed to operate the evaluation system that will be put in place to assess this project. This included data base packages, such as dBase III, and statistical packages, such as SPSS, required to carry out quantitative analyses of evaluation data.

Other partners bring to this project specific resources that enhance the likelihood of project success. These include the design and construction expertise of Barrier Free Environment staff, the dispute resolution and business contact resources of the Council of Better Business Bureaus, and the computer networking capabilities of the National Council on Independent Living. These resources, taken collectively and used effectively as indicated in the previous sections of this proposal, provide for a high likelihood that the project will be successful in meeting the EEOC's goals for facilitating implementation of ADA.

c. Effectiveness of Management Plan

The management plan is described in some detail under Task 2.2 in section 3 (a) Design of the Project, and in the interest of avoiding redundancy, is not repeated in detail here. However, to summarize, the management plan for this project calls for establishment of parallel management structures in the two primary collaborating organizations, DREDF and ILRU, with project directors being designated in both organizations who have overall responsibility for assuring adherence to project commitments and timetables. Under each project director, both professional and non-professional staff responsibilities have been assigned to specific individuals who the expertise to carry out those responsibilities. Once a notice of award has been received, staff from both organizations will confer to determine the most appropriate frequencies and modes of communication for reporting on specific activities of the projects. A tentative reporting frequency schedule has been suggested in section 3 (a) under Task 2.2, and firm decisions on these issues will be made during the first few days of the project.

The two principal organizations, DREDF and ILRU, conducting this project have extensive experience in conducting projects in which partner organizations are geographically remote--DREDF with its previous collaborations with BFE and other organizations doing Section 504 training,

and ILRU with its previous collaborations with Cornell University in successfully conducting management training using simulation methods. Although the management problems posed by fragmentation of responsibilities between geographically remote organizations are not to be taken lightly, given the experiences of the proposed offerors and the availability of real-time communication equipment, such as FAX, computer networks, and teleconferencing, the such problems can be managed effectively, and no major difficulties are anticipated in managing this project to a successful conclusion.

4. Experience in Administration and Financial Management of Federal Contracts

As discussed just previously and earlier in Section 2 Experience of the Offering Entity, both DREDF and ILRU have extensive experience in managing federally funded projects. DREDF's experience in this regard is primarily through its prior training program relating to implementation of Section 504 of the Rehabilitation Act. In carrying out Section 504 training, DREDF managed six separate federal contracts to deliver training and technical assistance or to support other organizations doing such in different parts of the country. All six contracts were carried out in accordance with specified timelines and deliverables were provided to the U.S. Department of Education as required under the terms of these contracts. Owing to the fact that DREDF has been very selective in pursuit of federal grants and contracts, it has been able to maintain a relatively lean management structure. For the proposed project, the management capabilities of DREDF will be expanded somewhat through the hiring of an administrative assistant and securing of additional part-time bookkeeping services to assure adequate capabilities to manage the proposed project successfully.

ILRU and its parent organization, The Institute for Rehabilitation and Research (TIIR), likewise have extensive experience in successful and timely completion of federal contracts. ILRU has successfully completed a federal contract to provide technical assistance services to people throughout Texas during the Section 504 training offered during the early 1980's. In addition, ILRU has successfully competed for and completed work under numerous federal grants and cooperative agreements. TIIR has administered many federal contracts and has both the operational and fiscal management capabilities to assure adequate management of the proposed project. A partial listing of grants and contracts successfully managed by ILRU is attached to this application.

5. Facilities and Support Personnel

a. Adequacy and Accessibility of Barrier-Free Facilities

The two principal organizations, DREDF and ILRU, which will be carrying out proposed activities are both operated primarily by people with severe disabilities. Because of this, both organizations insist on full accessibility in all programs and activities in which they have significant involvement. Both DREDF and ILRU are housed in office facilities are fully accessible to people in wheelchairs and to people with other types of disabilities. Both provide telecommunications access through TTY/TDD equipment for people with hearing impairment. Both also offer materials and other information in a variety of formats, including audiotape, large print, braille, and computer diskette. And both provide and/or make arrangements for

sign language interpreting, reader services, or other personal assistance services that may be required for people with various types of disabilities to access training, technical assistance, and other available services. DREDF and ILRU staff are acutely aware of the need for accessibility in all programmatic activities, and will adhere to the most stringent standards in providing accessibility to all activities and services offered through the proposed project.

Notwithstanding the efforts made by DREDF and ILRU to provide accessibility to their programs, there remain some accessibility issues relative to the proposed project that pose problems. These issues relate directly to the reasons for passage of ADA and have to do with accessibility in hotels and transportation services around the country. Since virtually all of the 80 persons participating in each of the five Phase One workshops and the 50 persons participating in each of the Phase Two workshops will be people with disabilities, it is essential that a large number of wheelchair accessible rooms and rooms equipped with visual fire alarms and other features for people with disabilities be secured for each training session.

The fact is that few hotels have more than ten wheelchair accessible rooms and those larger hotels that may have a greater number of accessible rooms are often outside of the price range that most participants will be able to afford. In order to accommodate the large numbers of participants and faculty with disabilities who will require accessibility features in sleeping facilities, it will be necessary to use hotels in close proximity to the hotel where training sessions will be held and which can offer additional accessible rooms and a range of prices within the financial reach of participants. Although this presents a challenge for the organizers of the training programs, it also offers the faculty and participants in those areas targeted opportunities to begin applying newly acquired negotiating skills in addressing problems of accessibility in the community at large. The problem of limited access to both transportation services and hotel facilities for people with disabilities is a real one in terms of the proposed project and one which will test the abilities of the project administrators to succeed. But it is one that can be addressed through effective advocacy and negotiation and through creative problem solving.

Another problem of accessibility that will need to be addressed through the project has to do with people who have disabilities related to environmental sensitivity. People with this type of disability cannot tolerate exposure to chemicals, such as those used in many cleaning products, personal hygiene products, foods, and other uses. To provide optimal access to people with environmentally-related disabilities, project staff will work with staffs of hotels to be used in the training to reduce to a minimum the amount of chemical products used in cleaning and other activities carried out in the hotels. Also, people attending training will be strongly encouraged to avoid using deodorants, perfumes and other chemicals that may be intolerable to individuals with environmentally-related disabilities. However, it is unrealistic to believe that all potentially problematic chemicals can be avoided in the facilities and, to provide access to individuals whose tolerance for chemicals may be less than can be effectively dealt with through negotiations with facilities staff and encouragement to other participants to avoid chemical products, the program will be prepared in a videotaped format for viewing in a setting where offensive materials are excluded. Other solutions to dealing with this problem will also be explored.

Finally, every effort will be made to ensure accessibility to people at the training sites. Sign language interpreters and readers will be provided, arrangements will be made for personal assistance services, and materials will be put into accessible formats, including audiotape, large print, and braille. Also, selected materials will be put into language formats with accompanying illustrations and graphics to allow for access by individuals with disabilities resulting in diminished reading and comprehension capabilities. These materials will be produced with the assistance of the Association for Retarded Citizens in Washington, D.C., and will be tested and refined over the course of the project to obtain the best possible supporting materials to assist people with reading and cognition disabilities to have optimal accessibility to the training and technical assistance services to be made available.

b. Adequacy of Planned Use of Equipment and Supplies

Plans for use of equipment and supplies have been predicated on getting the most equipment and supplies currently available from the participating organizations, and augmenting these resources as necessary to assure the best possible results from project efforts.

In order for the work to be completed in a timely manner, some additional computer capabilities will need to be secured at DREDF. This includes two computers for use in the Berkeley office by each of the full-time staff people who will be working on this project, Marilyn Golden, project coordinator, and the full-time secretary to be named. In both cases, the allocation of these individuals to full-time work on this project will result in equipment currently being used by them being assigned to other individuals who will pick up their current work loads. Also, one computer with high capacity, high speed capabilities will need to be secured for used by the Washington, D.C. project specialist and secretary. This equipment will be necessary to facilitate coordination of information between DREDF's east coast and west coast offices. Equipment currently available in the D.C. office is inadequate to handle the capacity or the communication needs of the project. Also, one additional Laserjet printer will be necessary to handle the high volume printing loads anticipated with this project. The one printer currently available in the DREDF office is at capacity and would not be adequate to meet printing demands that this project brings with it, and no back-up printer is currently available should problems develop with the existing printer.

DREDF will also need to purchase modems and accessories to handle computer networking, including establishing electronic mail capabilities connecting the Berkeley and Washington offices, that will be essential to this project. The purchase of equipment and training needed for enhancing DREDF's networking capabilities will allow for more cost-effective communication of high volume documents than can be achieved using FAX capabilities or shipping by air or ground.

Finally, some funding will need to be secured for upgrading DREDF's telephone system to handle the higher volume of telephone traffic that will be brought about as a result of this project. The upgrading of the telephone system will benefit DREDF overall, and only a portion of these equipment costs are being requested from this contract, with the remainder to be borne by DREDF through other sources.

DREDF will provide the major share of the equipment needed for this project through its existing resources. This includes computer equipment used by other staff, copying equipment, and a variety of standard office equipment, such as desks, chairs, and filing equipment that will be provided in-kind to carry out the proposed project.

ILRU will likewise provide most of the equipment required for its part of the project. However, in order to fulfill its materials preparation obligations for this project, one additional IBM-compatible 386 computer will be purchased for use by the project coordinator and the full-time materials preparation/technical assistance coordinator. Also, a plain paper FAX machine will need to be purchased to eliminate the need for recopying the large volume of paper that will be produced in transmitting materials preparation documents and follow-up reports from participants in the field. The availability of a plain paper FAX machine is expected to reduce staff time needed for this project by .15 to .20 FTE; that would otherwise be needed in cutting and recopying materials for easy handling by staff, including staff with disabilities.

Other than these additional limited equipment requirements to handle the increased volume of production to be generated from this project, ILRU will provide the greatest part of equipment required to carry out the proposed work. ILRU equipment to be used in this project includes several 286 and 386 computers with desk-top publishing capabilities, two Laserjet printers, a copier, and substantial standard office equipment, including desks, chairs, and other furnishings.

For both DREDF and ILRU, the estimate of consumable supply needs has been conservatively projected based upon experience in carrying out projects of similar scope. Because of the compatibility of the proposed project with other projects underway at both DREDF and ILRU, it will be possible to share expenses between similar projects, thereby keeping supply costs for this project at a minimum. Some supply costs, such as those indicated for preparation and shipping of materials, are relatively fixed, and will not be subject to reduction through other cost-sharing with other ongoing projects. These costs have been estimated using current production cost figures secured by staff at ILRU.

c. Availability of Support Staff Experienced in Word-Processing, Desk-Top Publishing and Accessing Data Bases

Both DREDF and ILRU have staff that are experienced in word processing and data base management. However, most of the materials preparation and data management functions will be carried out by staff at ILRU; as such the discussion of capabilities in this regard will focus on ILRU resources in these areas.

ILRU regularly produces a large volume of printed materials using desk-top publishing in order to keep costs to a minimum. The products generated by ILRU, including numerous monographs and special reports, as well as brochures and fact sheets, have been very well received and are adjudged to be of high quality at low cost. These capabilities will be used to their fullest in the proposed project, and ILRU's experience in carrying out work of this type is a strength that they bring to the project.

ILRU staff, likewise, have extensive experience in working with data bases of various kinds. Having established and maintaining the most comprehensive data base on independent living centers and programs in the country, ILRU staff have had to become adept at data base management. Staff have also learned to access other data bases effectively. Those data bases used frequently included REHABDATA, ABLEDATA, and the data base maintained by the Disability Statistics Program of the Institute for Health and Aging at the University of California-San Francisco. ILRU staff have experience accessing data bases through both telephone and mail communication, and for those with computer access capabilities, through computer linkages via modem. Data bases will be accessed as necessary to carry out the tasks indicated in this application.

d. Experience of Support Staff in Carrying Out Duties Related to Completion of a Federal Contract

Support staff of both DREDF and ILRU are experienced in carrying out duties required for completion of federal contracts. Both organizations have considerable experience in executing federally-funded projects, and both have staff in supporting roles who are proficient in report preparation, completion of required forms, and fiscal reporting. The support staff resources of both organizations are sufficient to complete the work detailed in this proposal. In fact, support staff time provided by both organizations will exceed the amount budgeted for this project, with additional support contributed by the organizations as a result of their involvement in other projects with aims and objectives congruent with the proposed ADA implementation project.

BIOSKETCHES

LEX FRIEDEN

PRESENT POSITIONS:

Senior Vice President for Planning, TIRR (The Institute for Rehabilitation and Research)

Assistant Professor of Rehabilitation, Baylor College of Medicine

Co-Principal Investigator, Assessing Independent Living Center Staff Capabilities to Deliver Ada-Related Services, National Institute on Disability and Rehabilitation Research

Project Director, Improving Service Delivery Systems for People with Disabilities, Robert Wood Johnson Project

Executive Director TIRR Foundation

PROFESSIONAL EXPERIENCE AND BACKGROUND:

Executive Director, National Council on the Handicapped. Note: In this position he was instrumental in conceiving and drafting the Americans with Disabilities Act (ADA). Washington, D.C., 1984-1988

Director, Independent Living Research Utilization Project, The Institute for Rehabilitation and Research, 1979-1984

Visiting Scholar, Human Service Administration Program, Cornell University, Summer, 1981

Research Instructor, Department of Rehabilitation, Baylor College of Medicine, 1978-1980

Research Director, New Options Project, The Institute for Rehabilitation and Research, 1976-1980

EDUCATION:

Oklahoma State University

Dates: Fall, 1967 Credits: None - dropped mid-semester due to automobile accident resulting in permanent paralysis of lower extremities
Honors and Awards: President's Scholarship; President's Council; Residence Hall Council

Northwestern Oklahoma State University

Dates: Summer, 1967, 1968 Credits: 11
Honors and Awards: Regent's Scholarship

University of Tulsa

Dates: Fall, 1968 - Spring, 1972
Graduated: December, 1971 Credits: 129
Degree: B.S. Major: Psychology GPA: 3.52
Honors and Awards: Graduated Cum Laude

ALAN MEYER

Alan Meyer has over ten years experience in the field of independent living. He has served as the executive director of the Houston Center for Independent Living, the Coalition of Texans with Disabilities and a consumer controlled organization providing personal assistance services. He most recently served as the first director of the Office on Services to Persons with Disabilities within the Texas Department of Human Services. During his tenure the board of directors of the agency, which administers the state's personal care and nursing home programs, adopted the agency, which administers the state's personal care and nursing home programs, adopted a position statement which specifically commits the agency to the development of expanded community-based rather than institutional services for people with disabilities. Meyer has been extensively involved in the ILRU long-term management training project as a member of the training team and has worked with Cornell University in its management training program. He is currently a freelance consultant and trainer in independent living.

BIOGRAPHICAL SKETCH

Quentin W. Smith

EDUCATION

Master of Science, State University of New York at Stony Brook, NY 1976
Major - Allied Health Administration

PROFESSIONAL EXPERIENCE

Instructor, Departments of Physical Medicine and Rehabilitation and Community Medicine, Baylor College of Medicine, Houston, TX	2/89- Present
Co-Director, ILRU National Long-Term Management Training Project for Executive Directors of Independent Living Centers, Houston, TX	10/89- Present
Co-Director, ILRU National Long-Term Management Training Project for Core Service Managers of Independent Living Centers, Houston, TX	10/87- 9/90
Grants and Contracts Manager, National Rehabilitation Hospital, Washington, DC	10/87- 12/88
Co-Director, ILRU National Long-Term Management Training Project for Executive Directors of Independent Living Centers, Houston, TX	10/84- 9/87
Executive Director, Houston Center for Independent Living Houston, TX	8/83- 3/85

SELECTED RELEVANT PUBLICATIONS

Smith QW, Richards LK, Nosek MA, and Gerken L. Education and training needs of independent living center managers. Rehabilitation Education, (in press).

Smith QW and Richards LK. The impact of independent living: A movement. In Krueger DW (ed.). Rehabilitation Psychology: A Comprehensive Textbook (second edition). Rockville, MD:An Aspen Publication, (in press).

Richards LK and Smith QW. Independent living in rural communities. Rural Special Education Quarterly, (in press).

Meyer A and Smith QW. The Roles and Responsibilities of Board Members of Independent Living Centers. In ILRU Management Support Series "Staying on Track." Houston, TX:ILRU, 1991

Burns TJ, Batavia AI, Smith QW, and DeJong G. The primary health care needs of persons with physical disabilities: What are the research and service priorities? Archives of Physical Medicine and Rehabilitation, 71(2), 138-143, 1990.

Smith QW. Liability Insurance Coverage for Independent Living Centers. In ILRU Management Support Series "Staying on Track." Houston, TX:ILRU, 1989

Smith QW and Richards LK. Board Effectiveness in Independent Living Centers. In ILRU Management Support Series "Staying on Track." Houston, TX:ILRU, 1987.

Revised August 5, 1991

Laurel Richards

EDUCATION:

Undergraduate: University of North Carolina at Asheville;
Bachelor of Arts, Literature, 1970

Graduate: University of Houston; Houston, Texas
Course work completed for Master of Arts,
English, 1974

PROFESSIONAL EXPERIENCE:

Director of Training; ILRU Research and Training Center on Independent Living at TIRR; The Institute for Rehabilitation and Research; September 1985 - present.

Project Director; ILRU Management Training Project for Independent Living Center Middle-level Managers; TIRR; September 1987 - present.

Project Director; ILRU; Management Training Project for Independent Living Center Directors; TIRR; September 1989 - present.

Director, ILRU, Management Training Project for Independent Living Center Administrators; TIRR; September 1985 - 1987.

Training and Materials Development Coordinator; Independent Living Research Utilization Project; TIRR; November 1977 - September 1985.

SELECTED PUBLICATIONS:

Smith, QW, Richards, LK, Nosek, MA, and Gerken, L. (1991). Education and training needs of independent living managers. Rehabilitation Education. In press.

Freiden, L and Richards, L, Guest editors. (1991). Rural Special Education Quarterly -- Special issue on independent living. In press.

Richards, L and Smith, Q. (1991). Independent living centers in rural communities. Rural Special Education Quarterly. In press.

Smith, Q and Richards, L. (1991). The impact of independent living: A movement. In Krueger, D.W. (ed.). Rehabilitation Psychology: A Comprehensive Textbook (second edition). Rockville, MD. Aspen Systems Corp. In Press.

Gerken, L and Richards, L. (1987). Directory of Technical Assistants. Houston: ILRU Program.

Richards, L and Smith, Q. (1987). An Orientation to Independent Living Centers. Houston: ILRU Program.

Smith, Q and Richards, L. (1987). "Board Effectiveness in Independent Living Centers". Staying on Track: ILRU Management Support Series. Houston: ILRU Program.

Laurie Gerken

EDUCATION:

University of Texas at Austin (freshman year)

University of Houston (sophomore and junior years)

University of Houston at Clear Lake (degree in progress)

EXPERIENCE:

Project Director. Innovative Strategies for Delivering Independent Living Services to Minority Persons with Disabilities; The Institute for Rehabilitation and Research; 1990 - present.

Director of Technical Assistance. ILRU Research and Training Center on Improving Management Effectiveness in Independent Living Centers, The Institute for Rehabilitation and Research; 1990 - present.

Technical Assistance Director. ILRU Research and Training Center on Independent Living at The Institute for Rehabilitation and Research; 1985-1990.

Rural Project Coordinator. Independent Living Research Utilization (ILRU) project; The Institute for Rehabilitation and Research; 1983-1986.

SELECTED PUBLICATIONS:

Smith, Q, Richards, L, Nosek, M, and Gerken, L. (1991). Education and training needs of independent living center managers. Rehabilitation Education. In press.

Gerken, L and Richards, L. (1987). Directory of Technical Assistants. Houston: ILRU Program.

Nosek, M, Richards L, Gerken, L, and Zhu, Y. (1987). ILRU Registry of Independent Living Programs. Houston: ILRU Program.

VOLUNTARY ORGANIZATIONS AND POSITIONS HELD:

Vice President, Coalition for Barrier Free Living/Houston Center for Independent Living

Board Member, Greater Houston Area Chapter of the American Red Cross

President, Southwest Wheelchair Athletic Association

Member, Governor's Committee on Employment of the Handicapped Media Relations Committee

Member, Houston Center for Handicapped Planning Committee

Member, Coalition of Texans with Disabilities

Member, Boy Scouts of America, Disabled Scouting Program

Margaret (Peg) A. Nosek, Ph.D.

EXPERIENCE

June 1991 - present - Principal Investigator, Assessing Independent Living Center Staff Capabilities to Deliver ADA-related Services, National Institute on Disability and Rehabilitation and Research

November 1984 - present - Assistant Professor, Department of Rehabilitation, Baylor College of Medicine, Director of Research, Independent Living Research Utilization Project, Research and Training Center on Independent Living at TIRR, Houston, Texas

June 1982 - July 1983 - Special Assistant to Justin W. Dart, Jr., chairperson of the Governor's Long-Range Planning Group for Texans with Disabilities, Austin, Texas

January - September 1982 - Technical Assistance Coordinator for the ILRU 504 Technical Assistance Office, The Institute for Rehabilitation and Research, Austin, Texas

CONSULTATION AND OTHER PROFESSIONAL ACTIVITIES

Lecture tour, Japan, September 7 - October 4, 1990: sponsored by a fellowship award from the World Rehabilitation Fund, delivered seven lectures (four of which were in Japanese) to over 700 persons.

Lecture, tour, Japan, September 4 - 20, 1988: at the invitation of the Japanese Association of Community Workshops (KYOSAREN), delivered six lectures in four cities to over 1,000 people.

Elected to the Board of Directors, American Rehabilitation Counseling Association, 1988 - 1991. Chair, Committee on Professional Concerns.

Editorial Board, Rehabilitation Counseling Bulletin, 1987 - present

Member, Human Rights Committee, American Association for Counseling and Development, 1988-1991.

PUBLICATIONS

Fourteen journal articles, two reports, and thirteen book chapters on various topics related to independent living, rehabilitation, disability policy, personal assistance services, and physical fitness

EDUCATION

Ph.D., Rehabilitation/Special Education, The University of Texas, Austin, 1984.

M. A. in Rehabilitation Counseling, The University of Texas, Austin, 1982
Work toward a Ph.D. in Music Theory, The University of Texas, Austin, 1977-1979

M. A. in Music, Case Western Reserve University, Cleveland, Ohio, 1976

B. M. in Music Theory, magna cum laude, Baldwin-Wallace College, Berea, Ohio, 1974