

| P & A<br>ED<br>Contact Info   | Federal<br>Funds | Grants/Other State<br>Funding?   | Total Annual<br>Budget   | Board-Member<br>Selection   | How many<br>board<br>members? | Any advisory council other<br>than PAIMI?   | Staff | Attorneys | Advocates | Others  | Impressions/Additional<br>Comments  |
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| <b>Disability Rights<br/>New Jersey</b><br><br>Joe Young<br><br>(609) 292-9742<br>jyoung@drnj.org | 2.5 million      | AT program in NJ (460K);<br>in-kind expenses (state<br>pays for rent utility and<br>postage) | 3.1 million (not<br>counting in-<br>kind expenses<br>which is<br>probably<br>another 350K) | Self-selection:<br>membership<br>committee. Staff<br>does recruitment<br>and the membership<br>committee reviews<br>and recommends to<br>the board. | 17                            | Used to have one for<br>everyone. PAD now too.<br>Because of getting the AT<br>grant they have an advisory<br>council for that too. | 37    | 10        | 15        | Intake Coordinator;<br>4 Secretaries;<br>Receptionist, 2<br>Program Assistants<br>(self-advocates),<br>HR/IT person, 2<br>Physical people | Interested to see how things<br>go. Major difference is that<br>being a state attorney came<br>with more prestige in court.<br>Freedom to hire and take<br>action is better in the private<br>sector. One benefit that<br>remained as part of the<br>legislation to abolish the state<br>agency was to allow for the<br>same access to<br>institutions/records (free of<br>charge). |

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| <b>Arizona Center for<br/>Disability Law</b><br><br>Peri Jude Radecic<br><br>(520) 327-9547<br>Ext. 323<br><br>cell (520) 275-3399<br><br>pradecid@azdisabil<br>itylaw.org | 2.1 million<br>(maybe a<br>little lower<br>but in the<br>ballpark -<br>maybe<br>1.8/1.9 -<br>might<br>have<br>some<br>carry-over<br>from last<br>year in<br>that<br>figure) | No state funding. Other<br>funding comes from<br>fundraising, several direct<br>mail appeals, and other<br>fund development efforts<br>with the board<br>(development chair).<br>Other efforts include<br>writing grants (150-200K<br>this year - trying to<br>double that for next year)<br>and trying to get a major<br>donation campaign<br>started. Attorney fees are<br>another funding source,<br>though they budget low<br>for that since it's hard to<br>know what's going to<br>come in. Bits and pieces<br>coming from special ed<br>and other mediations<br>(25K). Pending major<br>class action will bring in<br>250-300K, but they've<br>had it for 10 years. | 2.8 (She would<br>like to keep it<br>there next year<br>through<br>fundraising<br>and grant<br>writing, but is<br>scared about<br>PABSS and<br>the 9%<br>sequestration.) | Board selects future<br>board members - ED<br>helps with<br>recruitment. Board<br>has a recruitment<br>and retention<br>committee. No<br>outside<br>appointments,<br>strictly self-selection. | 19 at the<br>most (15-19,<br>but they like<br>to have 19<br>generally) | No - will have an ad hoc<br>committee to help make<br>recommendations for a<br>building purchase in<br>Tucson, but nothing other<br>than that, no. | 26 (split<br>between<br>Tucson<br>and<br>Phoenix<br>(two<br>largest<br>population<br>centers)<br>but only 8<br>in Tucson.<br>She's in<br>the Tucson<br>office but<br>drives back<br>and forth<br>and<br>Skypes<br>between<br>offices.) | 8<br>(including<br>ED and<br>her<br>Deputy<br>Director) | 8. Includes<br>intake. | Receptionist in<br>Pheonix (can<br>transfer calls<br>between offices).<br>Automated system<br>in Tucson. All of the<br>intake happens out<br>of the Phoenix<br>office. Office<br>manager in each<br>office, serving as an<br>administrative<br>assistant to ED. 2<br>legal secretaries in<br>each office. Two<br>directors of finance<br>and administration.<br>One accountant.<br>One person who<br>advises on IT<br>matters (website,<br>DAD). ED does the<br>press, lobbying and<br>everything else. | Largest concern with the move<br>to the private sector is going to<br>be budget support; if there<br>were cheaper rates from the<br>state as a state agency (for<br>instance on rent or health<br>care, etc.), those are going to<br>have to be absorbed entirely<br>into the budget with the move<br>to the private market, which<br>will be a struggle at the start.<br>Ms. Radecic suspects that the<br>joys of being a non-profit,<br>however, will outweigh that<br>additional difficulty because<br>there will no longer be<br>pressure from the state<br>government. Board<br>management is really<br>important! Help your board<br>recruit a good board - board<br>leadership is really key! Have<br>to really be an active board in<br>a different way than would be<br>the case, for instance, with<br>gubernatorial board |

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| <b>Disability Law<br/>Center, Inc. (MA)</b><br><br>Alan Kerzin<br><br>(617) 723-8455<br><br>akerzin@dlc-<br>ma.org | 2.09<br>million  | Close to 18% from a<br>mass legal assistance<br>corporation (state<br>appropriation). The rest is<br>grants and fundraising. | 2.5 million            | Nominating<br>committee<br>(ED/board president<br>suggest people,<br>interviewing process,<br>and then the<br>interested party<br>comes before the<br>board). Have<br>created pretty strict<br>rules regarding<br>composition (1/2 of<br>the board need to be<br>attorneys; 1/4 of the<br>board need to be<br>low-income clients<br>for example). | Max of 20                     | No (looking at setting up a<br>PAD advisory council and a<br>friends of DLC fundraising<br>committee) | 22 (2<br>offices) | More<br>attorney<br>heavy<br>(12) | 1 paralegal<br>advocate who<br>works on PAD<br>and voting | 2 paralegals<br>(intake); support<br>staff | Non-profit structure is just<br>much more flexible. No<br>negative. More autonomy. |

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| <b>Disability Law &amp; Advocacy Center of TN</b><br><br>Shirley Shea<br><br>(615) 298-1080<br><br>shirleys@dlactn.org | 2.25 million     | Some grant money but really minimal. Less than 1%. | Not much larger than the federal funding. | Advertising through a group called The Center for Non-profit Management (obtained some really good board members that way). Staff/other board members out in the community ID people they think would be good board members and recommend them to a governance committee of 5-6 board members with shared responsibilities (normally 2-3 board members sit in on the interview). Entire board makes the final decision together. | 14                            | No.                                       | 32    | 4         | 11        | 1 paralegal, 1 legal secretary, 3 fiscal dept., 2 administration staff (ED, Executive Assistant), 3 secretaries, 3 regional managers who also do advocacy work (three ground regions and three offices), 2.5 working in the intake unit (larger percentage of staff is certainly non-legal at this P&A) | She's willing to help in any way possible so give her a buzz if needed! She seemed great and very willing to help. She may not be extremely helpful, though, because she doesn't seem to know AS much about the transfer itself; we might look to past employees for more information about how internal attitudes related to the governor's thoughts that the P&A was better suited for the private sector. |

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| <b>Disability Rights<br/>Washington</b><br><br>Mark Stroh<br><br>(206) 324-1521<br><br>mstroh@dr-wa.org | 2 million        | 95% federal funding, no state funding currently. The 5% usually would be program income from litigation and grants that they apply for and receive. Small amount of money from donations. |                        | Self-selection (members of board elect - have done so since 1990) | 10 to 12                      | PAIMI, Disability Advisory Council (generally convene issue specific advisory focus groups on occasion) | 16+ 5-7 interns | 9 - doing the intake (more of a legal model) | 2 (systemic advocacy non-litigation), 1 (advocacy, self-advocacy, communications) Mr. Stroh stressed that they were involved in systems advocacy not lay-advocacy. | Controller, legal secretary, receptionist, administrator (does everything) | A finance committee and development committee are crucial to a successful organization in the private sector. |

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| <b>Georgia Advocacy<br/>Office, Inc.</b><br><br>Ruby Moore<br><br>(404) 885-1234<br><br>Rmoore@thegao.o<br>rg | 3.3 million      | A little more than a<br>quarter million per year in<br>other funding. Dept. of<br>Community Affairs gives<br>some funding as part of a<br>statewide citizen<br>advocacy project (all<br>state funds they get are<br>passed straight through<br>to citizen advocates or<br>self advocates). Legal<br>fees - about 750K waiting<br>to come in currently.<br>Other federal funds:<br>Office of Disability<br>Employment Policy funds<br>some of their<br>Employment First work.<br>GA council on DD - 50K. | Not much more<br>- all together its<br>just another<br>400K. They<br>also write<br>grants and get<br>private<br>donations. Not<br>a big treasure<br>trove of money<br>coming from<br>somewhere<br>else. | No outside<br>appointments.<br>Nominating<br>procedure - done<br>with the board and<br>the ED and the<br>executive level staff<br>looking to be sure<br>they have<br>representation from<br>all demographics<br>and geography,<br>while simultaneously<br>searching for<br>candidates with core<br>skills. No providers<br>on the board<br>because they want<br>to minimize conflicts<br>of interest as much<br>as possible (also<br>why they don't take<br>state funds). | 10 - 2 more<br>hoping to<br>come on and<br>one about to<br>leave | Advisory council for all the<br>employment work they do(<br>more of a steering<br>committee). PABSS. State-<br>wide citizen advocacy<br>Advisory council. (There are<br>independent boards of<br>directors within the<br>organizations that this P&A<br>"hosts" through the early<br>stages of development until<br>they are independent and<br>can spin off on their own (so<br>not a part of the "P&A<br>proper"). All of the things<br>they host are current with<br>their mission: pushing for<br>self and citizen advocacy<br>(Employment First GA,<br>People First GA). State<br>really won't host like this<br>P&A does so they're taking<br>a more grassroots approach<br>in an attempt to ensure that<br>these organizations fail<br>before ever getting started.) | 36 (78%<br>with<br>disabilities) | 7         | Almost all (all<br>employees<br>except for the<br>ED's assistant,<br>a receptionist,<br>and the CFO<br>and his two<br>finance staff<br>are engaged in<br>advocacy). 2<br>resource<br>advocates<br>(one's an<br>attorney) who<br>are 2 of their<br>most senior<br>staff - one has<br>been there 25<br>years. One<br>advocate also<br>runs the<br>PABBS<br>program. | SRC leadership team<br>(internal social world<br>valorization training -<br>among host<br>organizations as well -<br>to define a common<br>mission and talk about<br>how people with<br>disabilities are<br>regarded). Program<br>accountability review<br>team (cross program<br>group who throughout<br>the year randomly<br>pulls 1/3 of open<br>cases in a program<br>and looks at the<br>quality of advocacy in<br>those cases and<br>reports back to the<br>ED. Clinical team<br>(people who have<br>medical<br>backgrounds/licensed<br>clinical social workers<br>in an effort to have<br>that expertise in their<br>arsenal when it's<br>needed).<br>Investigations unit. | The biggest hazard in a<br>transition like this one is<br>internal and external<br>questioning of when and why<br>and what it means. With any<br>shift like this one, too, a<br>certain percentage of people<br>tend to fall out. It's hard to<br>match the salaries and<br>benefits of state employment<br>so it might be a good idea to<br>work with finance staff to craft<br>wages and benefits<br>comparable to what<br>employees are used to.) If<br>there is unionization, that's<br>even another can of worms.<br>Even despite these problems,<br>though, with VA's dire need for<br>services (and with role-clarity<br>issues abound). It can become<br>difficult to manage external<br>affairs whilst reorganizing<br>internall, but she applauds our<br>efforts. Anything she can do to<br>help is an option (even if its<br>just providing a friendly ear!). |

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| <b>Disability Rights<br/>North Carolina</b><br><br>Vicki Smith<br><br>(919) 856-2195<br><br>vicki.smith@disabilityrightsnc.org | 3.2 million      | Grants. Fundraising.           | 3.3 (3 million is federal and the rest is a couple of small grants and fundraising) | Specific requirements in the bylaws. Membership grid that tracks disability and other types of diversity (age, disability, location, attorney, fiscal management experience). Terms of office: first term is a one year term. Second term is a three year term. (longevity) Last term is a two year term. (transition) Vacancies are posted according to what the grid says they need (right now that's Hispanic people in a specific region of the state). Looking specifically for a development chair to provide board leadership in light of the | 17 (governance committee, program policy committee, joint finance/audit committee (have to have one outside person on that one), development committee) | No - Friends of Disability for Development (this group is for people who don't want to be on the board or do but when there is no slot to fill, and they help with fundraising and getting money/development.) | 42    | 10        | 6         | Organized by function. (See attachment for organizational chart of staff. Organized by function and what positions they have/how many in each position.) Legally based so more attorneys than non-attorneys. Objectives say that there has to be a 3-1 ratio of attorneys to advocates. Non-attorney advocates are in (checking in on 100 institutions) - investigations and monitoring unit. When an investigation is opened we're doing an objective investigation as opposed to an attorney-client relationship. | Copies/checklists/to-do lists and everything that she's ready to share. Already shared with NY and OH. |

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| <b>Disability Rights<br/>Wisconsin</b><br><br>Tom Masseau<br><br>(608) 267-0214<br><br>Tom.Masseau@dr<br>wi.org | 1.9 million  | 5 state grants. One comes through department of health and social services (legal grant - 900K). One allows them to operate a family care ombudsman program (800k). Also receive a grants for the Medicare part b health line. Grant that allows advocacy for people receiving SSI. Also negotiating with the state to get a grant for dual eligible population. | Just over 5 million    | Nomination. Traditional process with solicitation/nominations (in accordance with geographic/disability/ethnic requirements) completed by 3 nominating committee board members. Carter model (different that the Ford model approach) is used in that the board creates end goals/policies and the staff comes up with activities/means to meet those end goals. Hands-off board with the ED as a go-between. | 17 (at our max)               | No.                                       | New to the agency - only been there 4 months. There's going to be a restructure at some point, but just over 60 currently. | 70% (run from supervising, managing, regular) |           | Administrative staff, IT, lay-advocates. Low in terms of administrative employees. Attorneys pretty much prepare their own briefs. Top heavy with attorneys. | Keep everything transparent - both internally and with partners. Mission and values are still going to be there despite the transition to the private sector, but with more autonomy absent the government intervention. |
| <b>Reasons for Leaving State Gov't (public/private)</b>   |  |  |                        |   |                               |   |  |   |           |  |  |
| <b>Tennessee</b>  | P&A system was only in state gov't for a year. Then governor (Alexander) determined that it would be better served out in the community (happened long before she came). Governor chose a mom and pop educational advocacy organization just working Davidson County/Nashville area and designated them as the state advocacy system. He found it would be better if it were not part of state employment. Happened right at the beginning of the P&A system. One of the states that moved it out relatively quickly. (Doesn't know much about the reasoning behind it within the organization as she wasn't there during the transition.) |  |                        |   |                               |   |  |   |           |  |  |



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| <b>North Carolina</b>       | For over 20 years the disability community wanted the P&A out of state government. Friendly redesignation. 2003, the board of the in-state agency voted and recommended that they needed to move out of state government. Primary reason: disability community wanted it! What the disability community did not know that there was unknown financial mismanagement revealed in the transfer, so that was an added benefit of the move to the private sector. Transferred 5 years ago. |                                |                        |                           |                               |   |       |           |           |        |                                    |