

ARIZONA WORKFORCE



Arizona Department of Commerce, Research Administration

Oct 2, 2008

Forecast Update: Continued Slowing Into 2009, Projected Two-Year Loss of 47,000 Jobs

Arizona Department of Commerce, Research Administration's updated forecast projects a continued loss of nonfarm jobs for the calendar year 2008-2009 forecast period with a decrease of more than 47,000 jobs (-1.8 percent).

For 2008, Research Administration (RA) forecasts a loss of 34,000 jobs (-1.3 percent), and in 2009 RA projects employment reductions of 13,500 (-0.5 percent). In contrast, the previous forecast released in May

2008 projected a loss of 9,200 non-farm jobs (-0.3 percent) for the entire two-year forecast period.

Global Insight, a major economics forecasting and consulting firm based in Waltham, Mass., projects that national nonfarm employment will remain unchanged in 2008 and then have a slight loss of 150,000 jobs (-0.1 percent) in 2009 (see chart below).

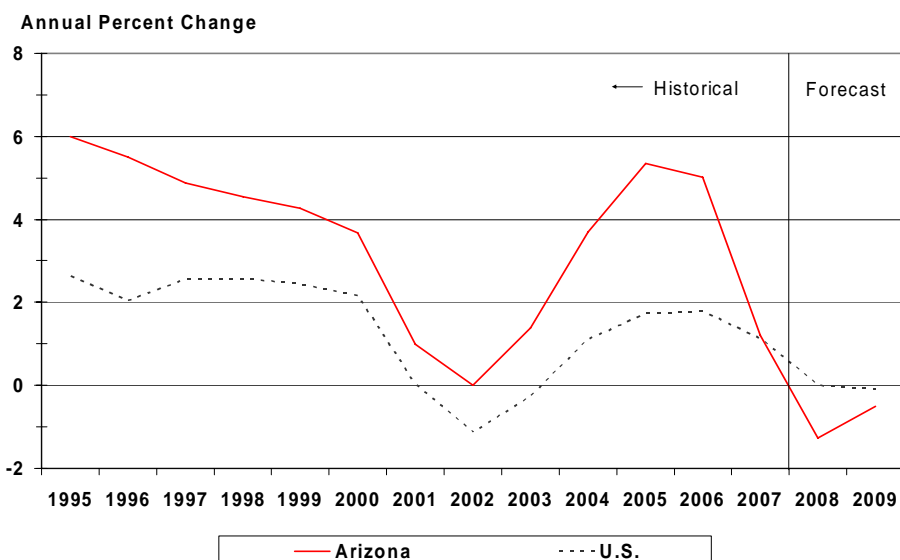
RA expects an Arizona recovery will be delayed until late 2009 and early

Total Nonfarm Employment Annual Average Growth Rate

	2007 ^(a)	2008 ^(b)	2009 ^(b)
Arizona	1.2%	-1.3%	-0.5%
Phoenix-Mesa-			
Scottsdale MSA ¹	1.3%	-1.4%	-0.4%
Tucson MSA ²	0.9%	-1.7%	-0.8%
Balance of State ³	1.0%	-0.3%	-0.6%

- 1) Maricopa and Pinal counties
- 2) Pima County
- 3) Arizona less Maricopa, Pinal and Pima counties
- a) Historical
- b) Forecast

Annual Percentage Change in Arizona and U.S. Nonfarm Employment, 1995-2007 (Historical) and 2008-2009 (Forecast)



2010 because of higher commodity prices, especially for food and energy, stagnant incomes and the effects of the crisis in finance and housing. Stagnant incomes and rising prices have reduced the real spending power of the consumer and damaged the industries dependent on consumer spending such as trade, transportation, leisure and hospitality.

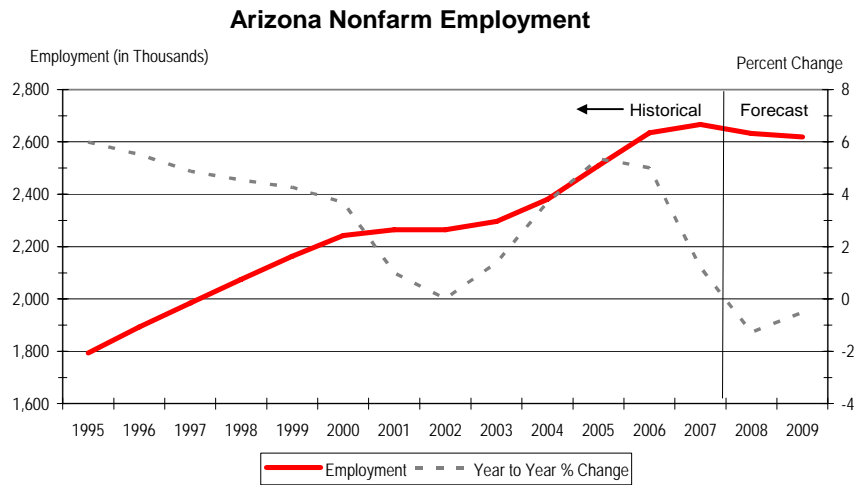
Indicators of the continued downturn in the housing market include rising rates of mortgage foreclosures, declining sales of new and existing homes, higher inventories of unsold houses, falling housing starts and a continued decline in home prices. The reduction of credit availability

Source: Arizona Department of Commerce, Research Administration, October 2008; and Global Insight, September 2008

as a result of widening financial market instability has served to compound the downturn in housing by increasing the difficulty in securing home loans for many buyers. As a result of tighter credit, less money is available to make loans not only for houses, but also other consumer and business purchases. Because of this reduced spending, firms are expected to decrease output and employment.

Unfortunately, the current financial crisis has spread to other parts of the world and is contributing to the slowdown in global economic growth. Besides financial turbulence, higher commodity prices (especially for food and energy) have also contributed to a global

Arizona Nonfarm Employment and Annual Percentage Change, 1995-2007 (Historical) and 2008-2009 (Forecast)



Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics; Forecast Data - Arizona Dept. of Commerce, Research Administration, October 2008

Arizona Industry Employment

Average Annual Percent Change

	2007 ^(a)	2008 ^(b)	2009 ^(b)
Manufacturing	-2.2%	-2.3%	-1.0%
Natural Resources/ Mining	14.1%	14.0%	7.1%
Construction	-6.6%	-14.0%	-6.8%
Trade, Transportation & Utilities	2.4%	-0.9%	-0.4%
Information	-3.2%	-2.5%	-0.9%
Financial Activities	0.4%	-4.1%	-1.7%
Professional & Business Services	1.9%	-1.2%	-0.7%
Education & Health Services	4.1%	3.5%	2.5%
Leisure & Hospitality	2.2%	0.7%	0.3%
Other Services	-1.2%	-1.2%	-0.5%
Government	3.5%	1.7%	0.1%

a) Historical
b) Forecast

economic slowdown. RA projects economic and financial problems in Asia and Europe will impact Arizona by reducing demand for the state's exports and limiting the supply of imported capital available for domestic lending.

As a result of worsening problems in the financial and housing markets, job losses in construction are projected to deepen during the 2008-'09 forecast period to number more than 44,000, or a decline of almost 20 percent. RA projects a loss of 31,000 jobs in 2008 and 13,000 jobs for '09.

The downturn in the construction industry is projected to contribute to the reduction of employment in the professional and business services industry group. Companies in this major industry group hire many construction employees through the em-

ployment services sector with its many contract and temporary labor services firms. As a result, RA projects a loss of more than 7,000 jobs (-1.9 percent) for forecast period.

Job losses in financial activities are forecast to total more than 10,000 jobs (-5.7 percent) from 2008-2009. Recent merger and acquisition activity in the financial services industry is projected to contribute to employment decreases.

Slowing economic growth in the domestic and international economy has reduced the demand for goods produced in Arizona's factories. RA forecasts a reduction of almost 6,000 jobs (-3.3 percent), in manufacturing in 2008 and '09 as a consequence of decreased demand.

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Trade, transportation and utilities is forecast to have job losses as a result of curtailed business and consumer spending in response to the economic downturn. During the forecast period, RA projects total job decreases will number 7,000 (-1.3 percent).

Other services is projected to have a total reduction of 1,600 jobs (-1.7 percent) over the two-year period. Increased demand for repair services, however, is forecast to bolster this major industry as a result of financially stressed businesses and

About This Publication

Arizona Workforce is published 14 times a year by the Arizona Dept. of Commerce, Research Administration (RA) — 12 as the monthly Employment Report and twice a year as RA’s two-year Forecast Report.

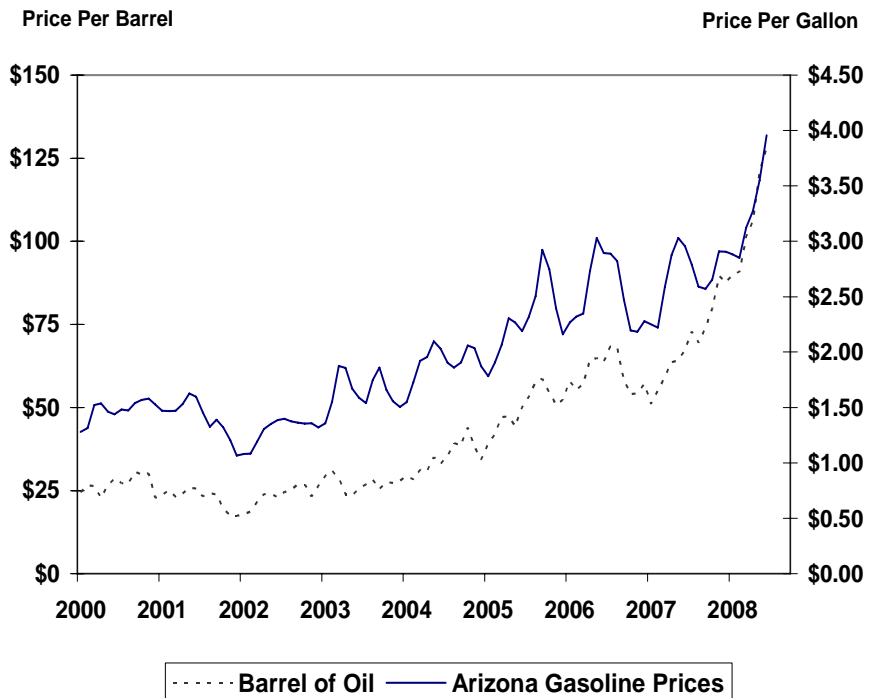
Copies of the reports are available at RA’s Web site, www.workforce.az.gov, or by requesting a printed copy by calling 602-771-1100; writing to 1700 W. Washington, B32, Phoenix, AZ 85007; or sending an e-mail to: webmaster@workforce.az.gov

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**Arizona Dept. of Commerce,
Research Administration**

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World Price Per Barrel of Oil and Arizona Retail Unleaded Gasoline Price, Jan. 2000-June 2008



* Arizona gasoline price includes federal and state taxes of 36.4 cents

Source: U.S. Dept of Energy, Energy Information Administration, October 2008

consumers delaying the purchases of new equipment and machinery.

Information job reductions are forecast to number 1,400 (-3.3 percent) in 2008 and '09.

Educational and health services is projected to have the largest job growth of any major industry group with a gain of more than 18,000 jobs (6.1 percent) in the forecast period.

Despite a growing and aging population, the growth rate is forecast to slow as a consequence of the current economic downturn.

Employment gains in the public sector are forecast to number 7,500 (1.8 percent) in 2008 and '09. The reduction in government tax revenue

as a result of a slowing economy is forecast to sharply curtail job growth in 2009, especially in the state and local education sectors.

Leisure and hospitality is projected to have a gain of 2,700 jobs (1.0 percent) during the forecast period.

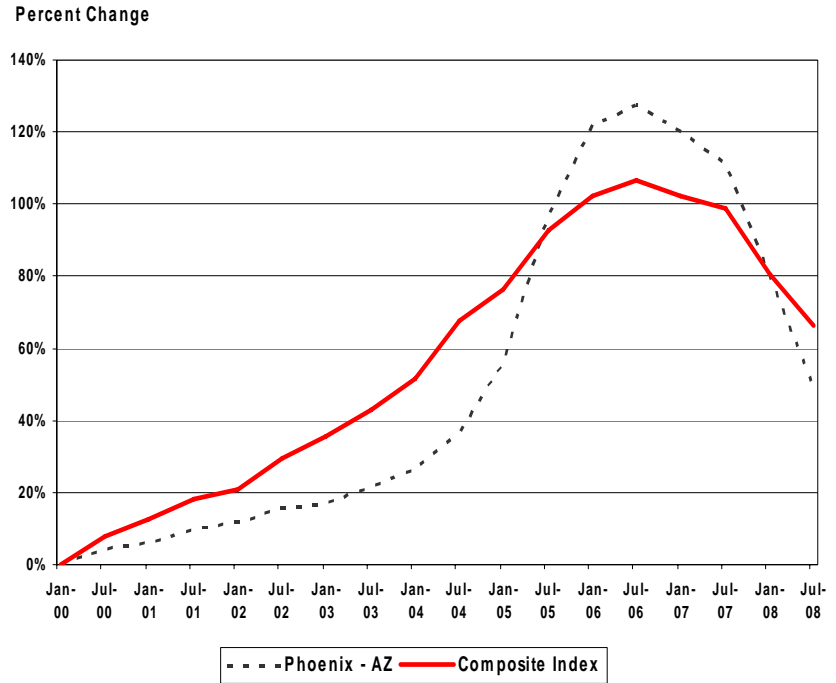
Local tourism is forecast to provide some compensation for the reduction in the number of domestic and international travelers.

Natural resources and mining is projected to have slowing job growth as a result of reduced economic expansion in the rest of the world, especially in Asia. RA forecasts an increase of 2,500 jobs (22 percent).

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In conclusion, RA’s updated forecast projects a greater loss of nonfarm employment (-47,000 jobs or -1.8 percent) in 2008-'09 compared to its previous forecast released in May (-9,200 jobs, or -0.3 percent) because of a loss in business and consumer confidence. Higher food and energy prices, falling home values, stagnant incomes and contracting credit have all combined to erode business and consumer confidence.

S&P/Case-Shiller Home Price Indices,
 Percent Change in Home Resale Value,
 Phoenix Metro Area, Composite Index of 20 Cities,
 Jan. 2000-July 2008*



* Standard & Poors/Case-Shiller Home Price Indices track changes in the value of residential real estate market in 20 metropolitan regions across the United States. Data are calculated monthly and published with a two month lag. For this index, data points are January and July of each year

Source: Standard & Poor's & Fiserv, September 2008

Release Presented by: Dennis Doby, Senior Director, Research Administration

Contact: For clarification or additional information, call (602) 771-1100

Next Press Briefing: **September Employment Report** — Thursday, Oct. 16, 10 a.m., Executive Tower, Conf. Room 6A, 1700 W. Washington St., Phoenix

Arizona’s Workforce and additional economic data are on the Internet at:
<http://www.workforce.az.gov>

Equal Opportunity Employer/Program (see back page for more information)

Arizona Employment Forecast

(In Thousands)

	Historical			Forecast	
	2005	2006	2007	2008	2009
Total Nonfarm Employment	2508.8	2634.5	2666.0	2632.1	2618.5
<i>Numerical Change</i>	127.5	125.7	31.5	-33.9	-13.5
<i>Percent Change</i>	5.4%	5.0%	1.2%	-1.3%	-0.5%
Manufacturing	182.3	185.7	181.7	177.6	175.8
<i>Numerical Change</i>	5.2	3.4	-4.0	-4.1	-1.8
<i>Percent Change</i>	2.9%	1.9%	-2.2%	-2.3%	-1.0%
Natural Resources & Mining	8.6	9.9	11.3	12.9	13.8
<i>Numerical Change</i>	0.3	1.3	1.4	1.6	0.9
<i>Percent Change</i>	3.6%	15.1%	14.1%	14.0%	7.1%
Construction	219.4	240.3	224.4	193.0	179.8
<i>Numerical Change</i>	27.7	20.9	-15.9	-31.4	-13.2
<i>Percent Change</i>	14.4%	9.5%	-6.6%	-14.0%	-6.8%
Trade, Transportation, & Utilities	488.6	512.2	524.5	519.5	517.5
<i>Numerical Change</i>	25.9	23.6	12.3	-5.0	-2.0
<i>Percent Change</i>	5.6%	4.8%	2.4%	-0.9%	-0.4%
Information	45.3	44.1	42.7	41.6	41.3
<i>Numerical Change</i>	-1.6	-1.2	-1.4	-1.1	-0.4
<i>Percent Change</i>	-3.4%	-2.6%	-3.2%	-2.5%	-0.9%
Financial Activities	174.4	182.8	183.6	176.1	173.1
<i>Numerical Change</i>	9.7	8.4	0.8	-7.5	-3.0
<i>Percent Change</i>	5.9%	4.8%	0.4%	-4.1%	-1.7%
Professional & Business Services	366.0	394.4	401.7	396.9	394.0
<i>Numerical Change</i>	27.3	28.4	7.3	-4.8	-2.8
<i>Percent Change</i>	8.1%	7.8%	1.9%	-1.2%	-0.7%
Education & Health Services	275.7	291.6	303.7	314.4	322.2
<i>Numerical Change</i>	15.0	15.9	12.1	10.7	7.8
<i>Percent Change</i>	5.8%	5.8%	4.1%	3.5%	2.5%
Leisure & Hospitality	254.3	266.7	272.7	274.5	275.4
<i>Numerical Change</i>	12.6	12.4	6.0	1.8	1.0
<i>Percent Change</i>	5.2%	4.9%	2.2%	0.7%	0.3%
Other Services	91.4	98.2	97.0	95.8	95.4
<i>Numerical Change</i>	2.0	6.8	-1.2	-1.2	-0.5
<i>Percent Change</i>	2.2%	7.4%	-1.2%	-1.2%	-0.5%
Government	402.9	408.5	422.7	429.7	430.2
<i>Numerical Change</i>	3.5	5.6	14.2	7.0	0.5
<i>Percent Change</i>	0.9%	1.4%	3.5%	1.7%	0.1%

Note - All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

Phoenix-Mesa-Scottsdale MSA Employment Forecast

(In Thousands)

	Historical			Forecast	
	2005	2006	2007	2008	2009
Total Nonfarm Employment	1787.7	1884.1	1908.5	1882.5	1874.0
<i>Numerical Change</i>	104.0	96.4	24.4	-26.0	-8.5
<i>Percent Change</i>	6.2%	5.4%	1.3%	-1.4%	-0.4%
Manufacturing	136.5	139.9	137.2	134.5	133.3
<i>Numerical Change</i>	4.6	3.4	-2.7	-2.7	-1.3
<i>Percent Change</i>	3.5%	2.5%	-1.9%	-2.0%	-0.9%
Natural Resources & Mining	2.2	2.7	3.1	3.4	3.5
<i>Numerical Change</i>	0.1	0.5	0.4	0.3	0.2
<i>Percent Change</i>	4.8%	22.7%	14.8%	9.0%	4.5%
Construction	163.9	180.1	168.7	143.4	133.9
<i>Numerical Change</i>	22.3	16.2	-11.4	-25.3	-9.5
<i>Percent Change</i>	15.7%	9.9%	-6.3%	-15.0%	-6.6%
Trade, Transportation, & Utilities	362.1	379.5	388.8	384.2	382.0
<i>Numerical Change</i>	21.5	17.4	9.3	-4.6	-2.2
<i>Percent Change</i>	6.3%	4.8%	2.5%	-1.2%	-0.6%
Information	33.3	32.4	31.3	30.6	30.3
<i>Numerical Change</i>	-1.3	-0.9	-1.1	-0.7	-0.3
<i>Percent Change</i>	-3.8%	-2.7%	-3.4%	-2.2%	-0.9%
Financial Activities	147.0	153.4	153.6	148.6	146.6
<i>Numerical Change</i>	8.3	6.4	0.2	-5.0	-2.0
<i>Percent Change</i>	6.0%	4.4%	0.1%	-3.3%	-1.3%
Professional & Business Services	296.8	319.2	324.2	319.9	317.4
<i>Numerical Change</i>	23.0	22.4	5.0	-4.3	-2.5
<i>Percent Change</i>	8.4%	7.5%	1.6%	-1.3%	-0.8%
Education & Health Services	184.1	196.3	204.9	214.4	221.4
<i>Numerical Change</i>	10.5	12.2	8.6	9.5	7.0
<i>Percent Change</i>	6.0%	6.6%	4.4%	4.7%	3.2%
Leisure & Hospitality	170.4	180.5	186.4	189.9	191.8
<i>Numerical Change</i>	8.5	10.1	5.9	3.5	1.9
<i>Percent Change</i>	5.3%	5.9%	3.3%	1.9%	1.0%
Other Services	66.0	71.0	70.4	70.1	70.0
<i>Numerical Change</i>	1.8	5.0	-0.6	-0.3	-0.1
<i>Percent Change</i>	2.8%	7.6%	-0.8%	-0.4%	-0.2%
Government	225.5	229.2	239.8	243.6	243.9
<i>Numerical Change</i>	4.7	3.7	10.6	3.8	0.3
<i>Percent Change</i>	2.1%	1.6%	4.6%	1.6%	0.1%

Note - All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

Tucson MSA Employment Forecast

(In Thousands)

	Historical			Forecast	
	2005	2006	2007	2008	2009
Total Nonfarm Employment	366.7	379.6	383.1	376.4	373.5
<i>Numerical Change</i>	9.6	12.9	3.5	-6.7	-2.9
<i>Percent Change</i>	2.7%	3.5%	0.9%	-1.7%	-0.8%
Manufacturing	28.3	28.1	27.5	27.0	26.8
<i>Numerical Change</i>	-0.1	-0.2	-0.6	-0.5	-0.2
<i>Percent Change</i>	-0.4%	-0.7%	-2.1%	-1.9%	-0.7%
Natural Resources & Mining	1.4	1.6	1.8	2.1	2.2
<i>Numerical Change</i>	0.1	0.2	0.2	0.3	0.2
<i>Percent Change</i>	7.7%	14.3%	12.5%	14.5%	8.0%
Construction	25.7	27.9	26.4	23.6	22.3
<i>Numerical Change</i>	1.7	2.2	-1.5	-2.8	-1.3
<i>Percent Change</i>	7.1%	8.6%	-5.4%	-10.5%	-5.4%
Trade, Transportation, & Utilities	59.6	62.7	63.9	63.0	62.8
<i>Numerical Change</i>	1.7	3.1	1.2	-0.9	-0.2
<i>Percent Change</i>	2.9%	5.2%	1.9%	-1.4%	-0.4%
Information	7.2	6.8	6.0	5.4	5.2
<i>Numerical Change</i>	-0.4	-0.4	-0.8	-0.6	-0.2
<i>Percent Change</i>	-5.3%	-5.6%	-11.8%	-10.0%	-3.0%
Financial Activities	16.5	17.6	17.8	15.7	14.7
<i>Numerical Change</i>	0.6	1.1	0.2	-2.1	-0.9
<i>Percent Change</i>	3.8%	6.7%	1.1%	-12.0%	-6.0%
Professional & Business Services	45.9	49.7	52.3	51.8	51.4
<i>Numerical Change</i>	2.5	3.8	2.6	-0.5	-0.3
<i>Percent Change</i>	5.8%	8.3%	5.2%	-1.0%	-0.6%
Education & Health Services	50.5	52.6	54.2	54.7	55.2
<i>Numerical Change</i>	2.7	2.1	1.6	0.5	0.5
<i>Percent Change</i>	5.6%	4.2%	3.0%	1.0%	0.8%
Leisure & Hospitality	39.8	40.6	39.8	39.2	38.8
<i>Numerical Change</i>	0.7	0.8	-0.8	-0.6	-0.3
<i>Percent Change</i>	1.8%	2.0%	-2.0%	-1.6%	-0.9%
Other Services	14.7	15.8	15.5	14.7	14.4
<i>Numerical Change</i>	0.0	1.1	-0.3	-0.8	-0.3
<i>Percent Change</i>	0.0%	7.5%	-1.9%	-5.0%	-2.0%
Government	77.1	76.3	77.9	79.3	79.5
<i>Numerical Change</i>	0.2	-0.8	1.6	1.4	0.2
<i>Percent Change</i>	0.3%	-1.0%	2.1%	1.8%	0.2%

Note - All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

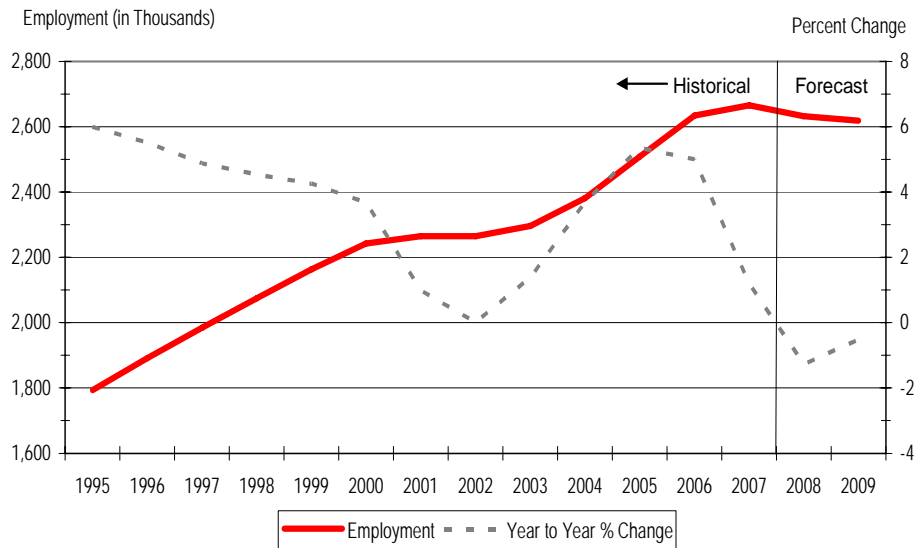
Balance of State Employment Forecast

(In Thousands)

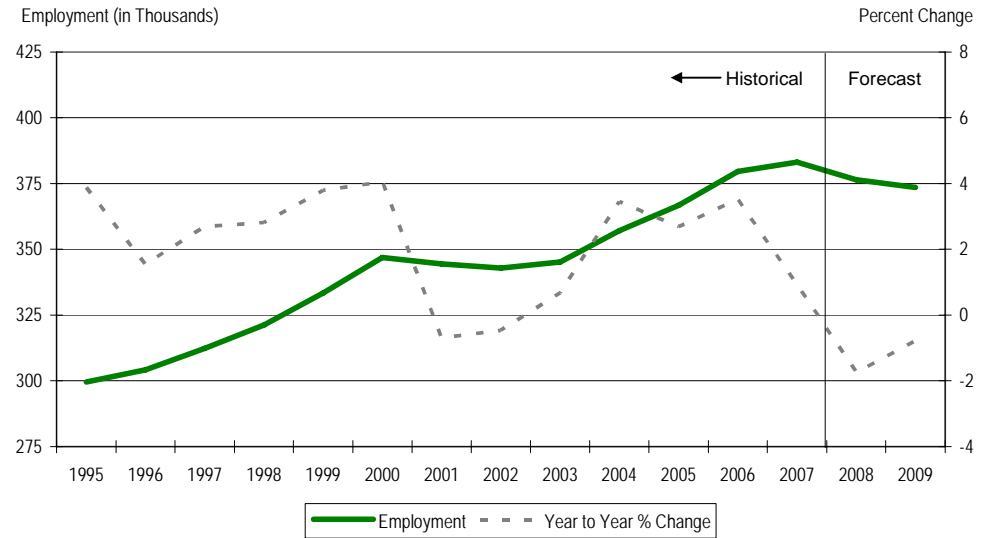
	Historical			Forecast	
	2005	2006	2007	2008	2009
Total Nonfarm Employment	354.4	370.8	374.4	373.1	371.0
<i>Numerical Change</i>	13.9	16.4	3.6	-1.3	-2.1
<i>Percent Change</i>	4.1%	4.6%	1.0%	-0.3%	-0.6%
Manufacturing	17.5	17.7	17.0	16.1	15.7
<i>Numerical Change</i>	0.7	0.2	-0.7	-0.9	-0.4
<i>Percent Change</i>	4.2%	1.1%	-4.0%	-5.3%	-2.3%
Natural Resources & Mining	5.0	5.6	6.4	7.4	8.0
<i>Numerical Change</i>	0.1	0.6	0.8	1.0	0.6
<i>Percent Change</i>	2.0%	12.0%	14.3%	16.3%	8.0%
Construction	29.8	32.3	29.3	26.0	23.5
<i>Numerical Change</i>	3.7	2.5	-3.0	-3.3	-2.4
<i>Percent Change</i>	14.2%	8.4%	-9.3%	-11.4%	-9.3%
Trade, Transportation, & Utilities	66.9	70.0	71.8	72.3	72.7
<i>Numerical Change</i>	2.7	3.1	1.8	0.5	0.4
<i>Percent Change</i>	4.2%	4.6%	2.6%	0.7%	0.5%
Information	4.8	4.9	5.4	5.6	5.7
<i>Numerical Change</i>	0.1	0.1	0.5	0.2	0.1
<i>Percent Change</i>	2.1%	2.1%	10.2%	4.1%	1.7%
Financial Activities	10.9	11.8	12.2	11.9	11.7
<i>Numerical Change</i>	0.8	0.9	0.4	-0.3	-0.1
<i>Percent Change</i>	7.9%	8.3%	3.4%	-2.7%	-1.1%
Professional & Business Services	23.3	25.5	25.2	25.3	25.3
<i>Numerical Change</i>	1.8	2.2	-0.3	0.1	0.0
<i>Percent Change</i>	8.4%	9.4%	-1.2%	0.2%	0.0%
Education & Health Services	41.1	42.7	44.6	45.3	45.7
<i>Numerical Change</i>	1.8	1.6	1.9	0.7	0.4
<i>Percent Change</i>	4.6%	3.9%	4.4%	1.5%	0.8%
Leisure & Hospitality	44.1	45.6	46.5	45.5	44.8
<i>Numerical Change</i>	3.4	1.5	0.9	-1.0	-0.6
<i>Percent Change</i>	8.4%	3.4%	2.0%	-2.3%	-1.4%
Other Services	10.7	11.4	11.1	11.0	10.9
<i>Numerical Change</i>	0.2	0.7	-0.3	-0.1	0.0
<i>Percent Change</i>	1.9%	6.5%	-2.6%	-1.0%	-0.4%
Government	100.3	103.0	105.0	106.8	106.9
<i>Numerical Change</i>	-1.4	2.7	2.0	1.8	0.0
<i>Percent Change</i>	-1.4%	2.7%	1.9%	1.7%	0.0%

Note - All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

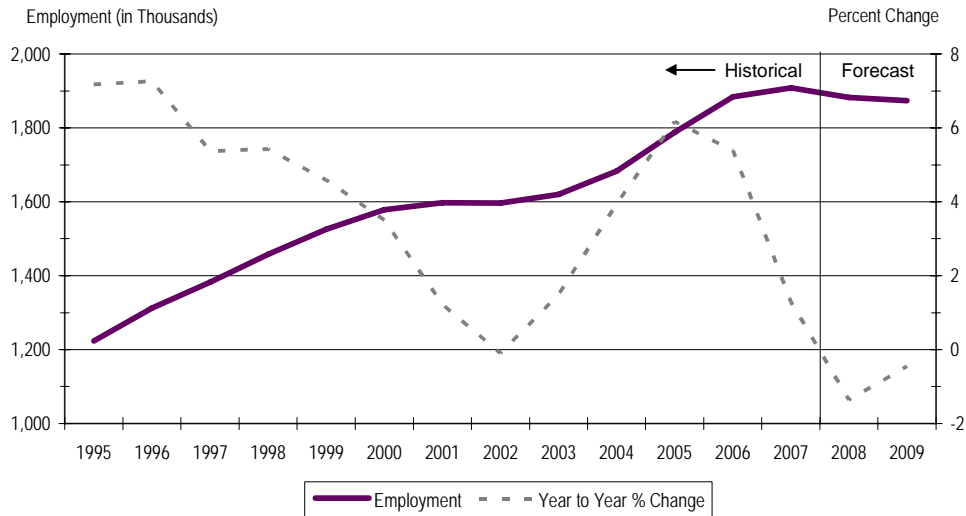
Arizona Nonfarm Employment



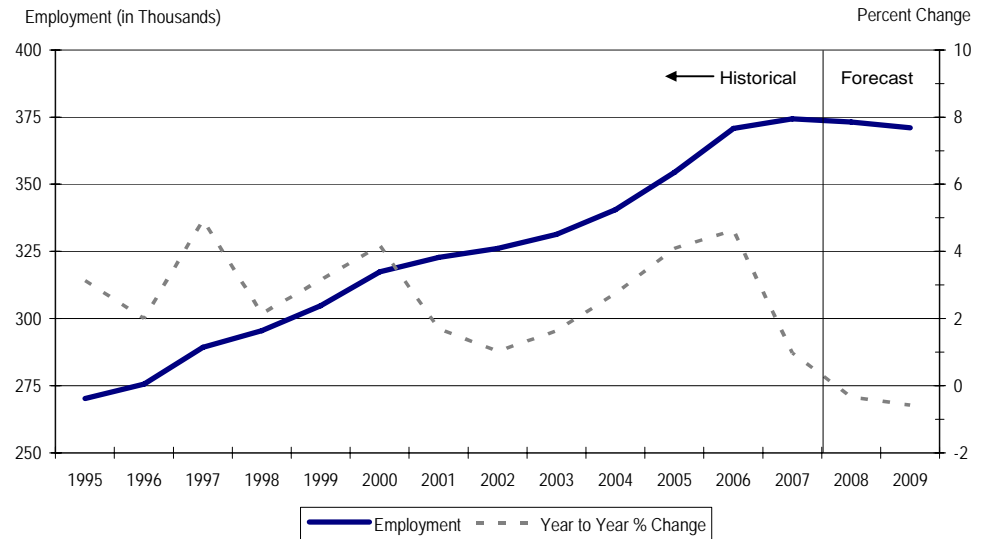
Tucson MSA Nonfarm Employment



Phoenix-Mesa-Scottsdale MSA Nonfarm Employment



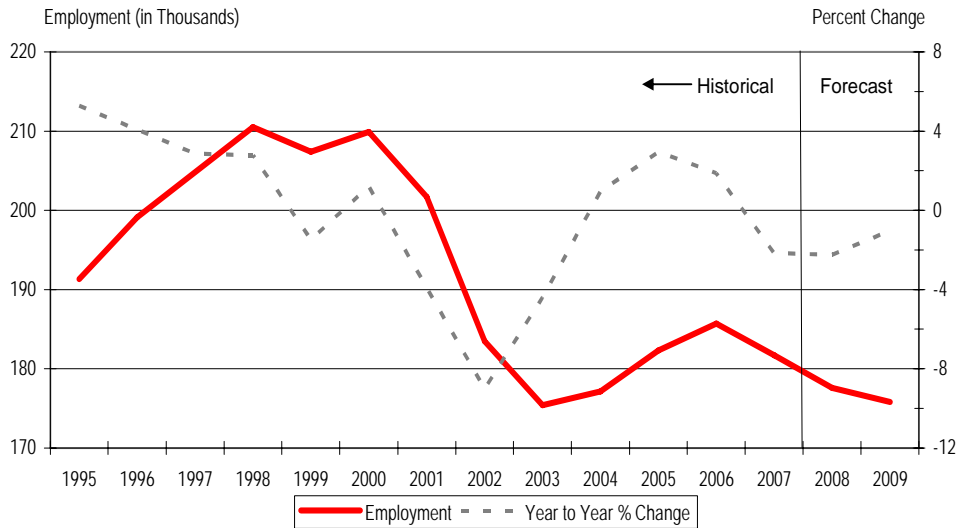
Balance of State Nonfarm Employment



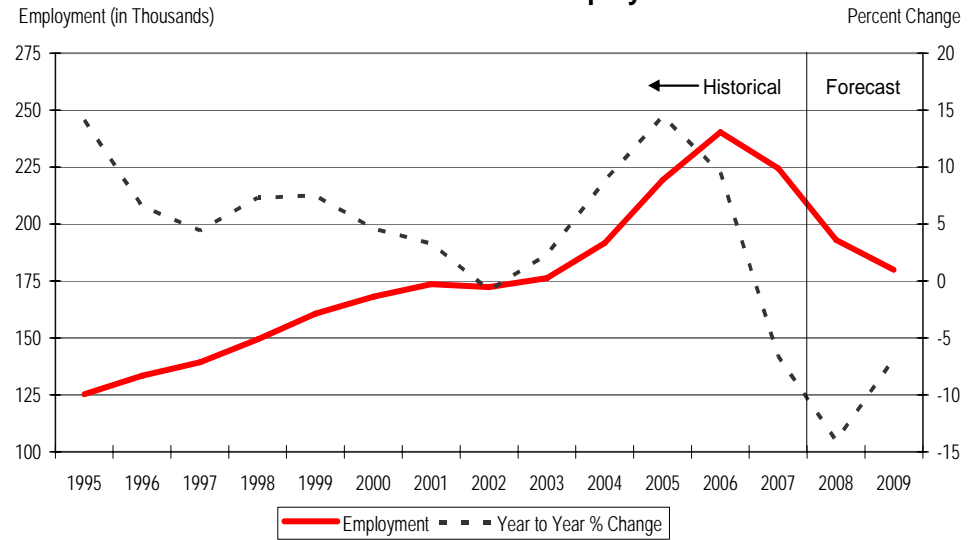
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Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics;
Forecast Data - Arizona Dept. of Commerce, Research Administration, October 2008

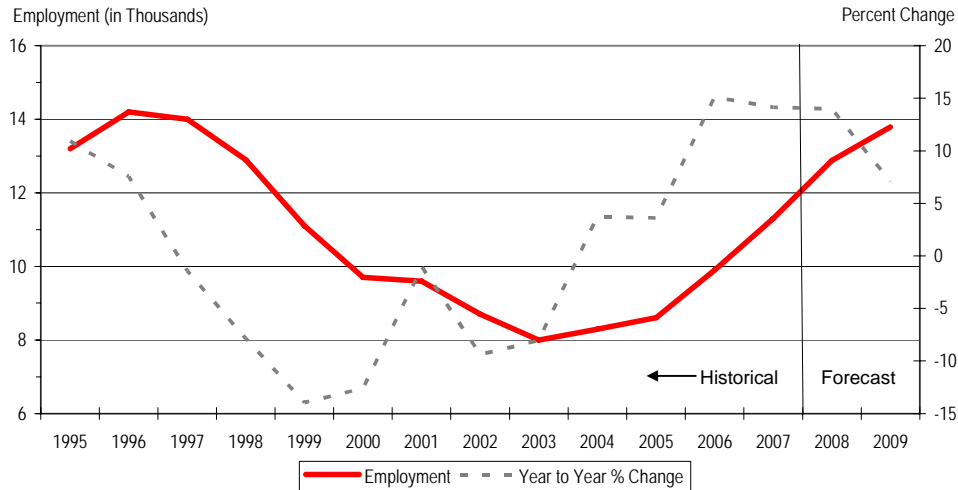
Arizona Manufacturing Employment



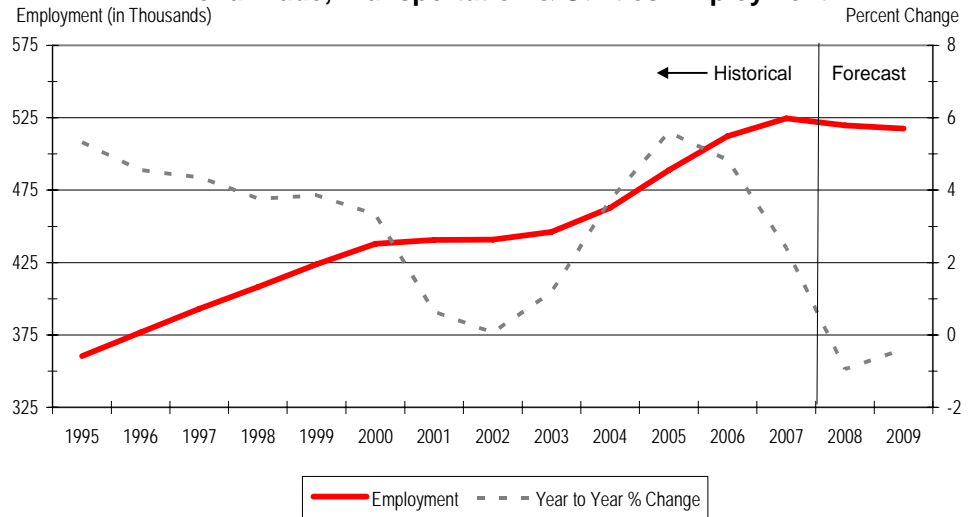
Arizona Construction Employment



Arizona Natural Resources & Mining Employment



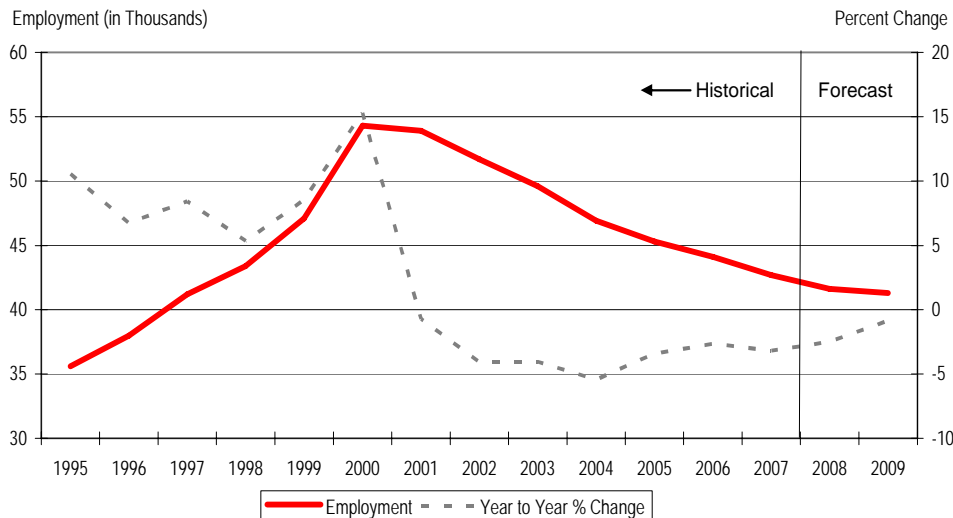
Arizona Trade, Transportation & Utilities Employment



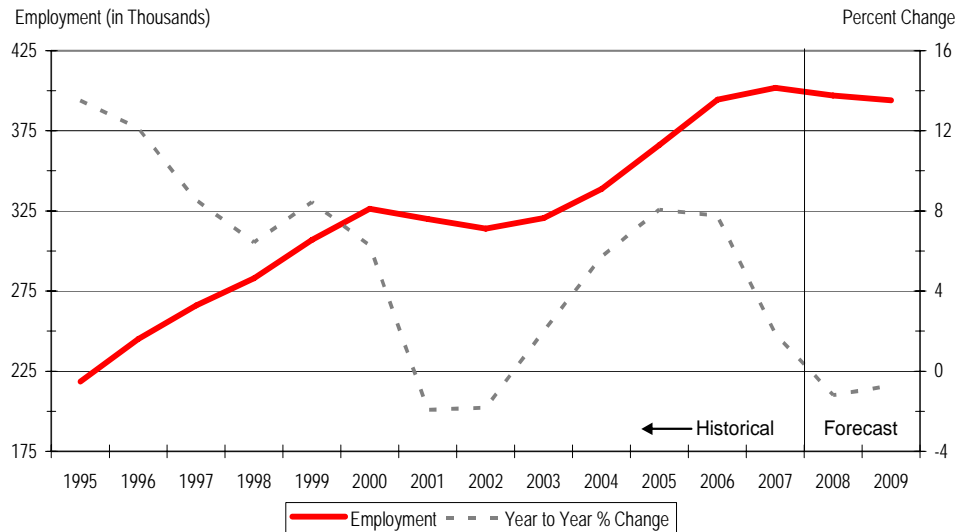
Note: All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

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Forecast Data - Arizona Dept. of Commerce, Research Administration, October 2008

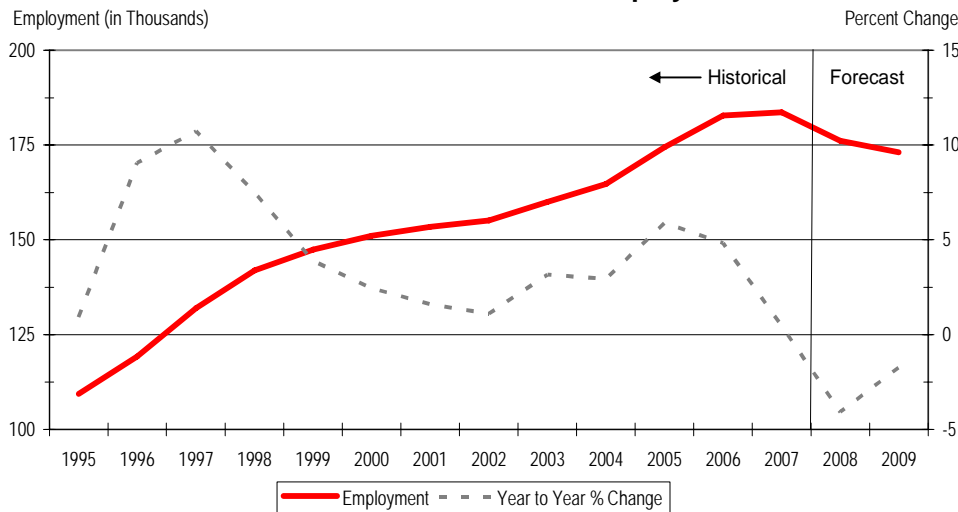
Arizona Information Employment



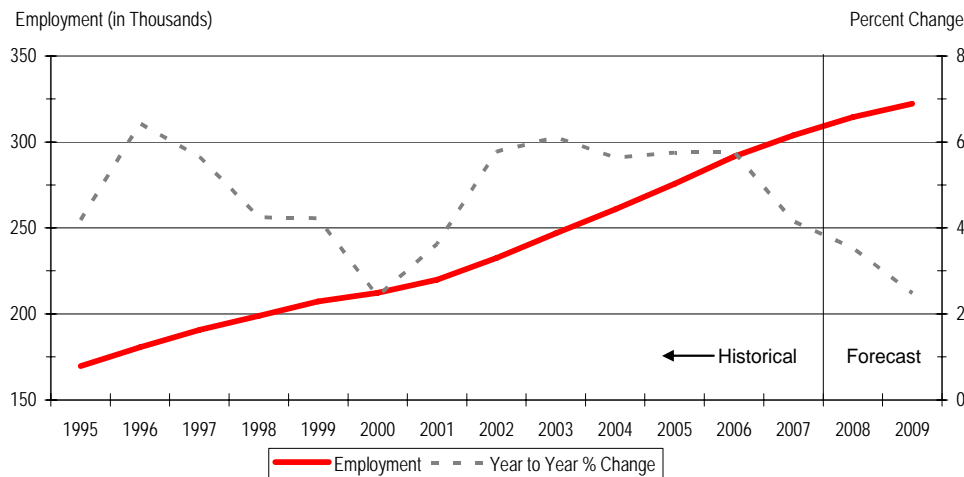
Arizona Professional & Business Services Employment



Arizona Financial Activities Employment



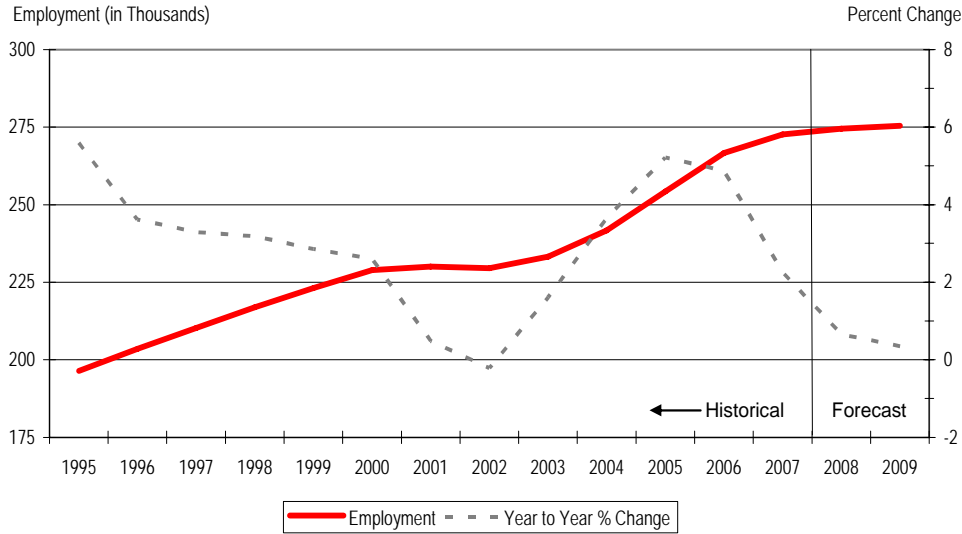
Arizona Education & Health Services Employment



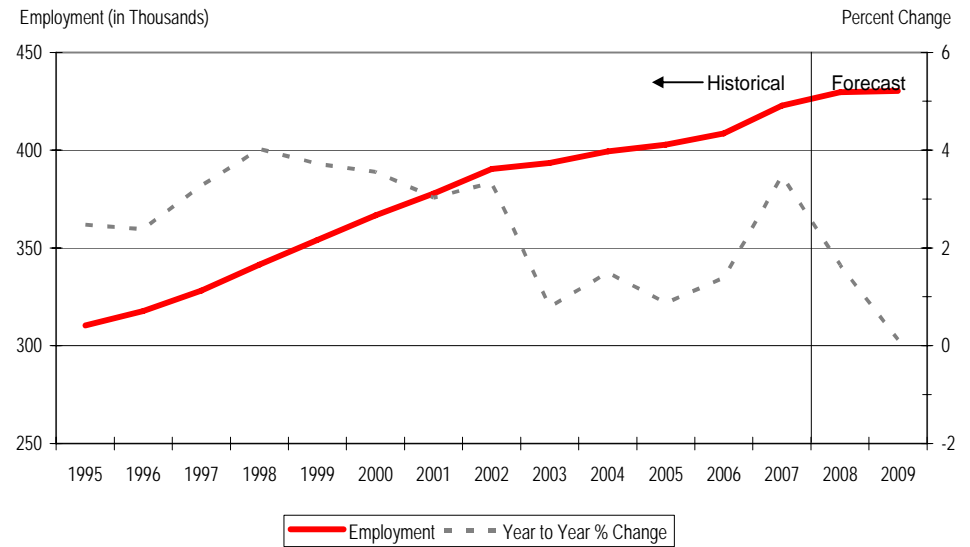
Note: All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

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Forecast Data - Arizona Dept. of Commerce, Research Administration, October 2008

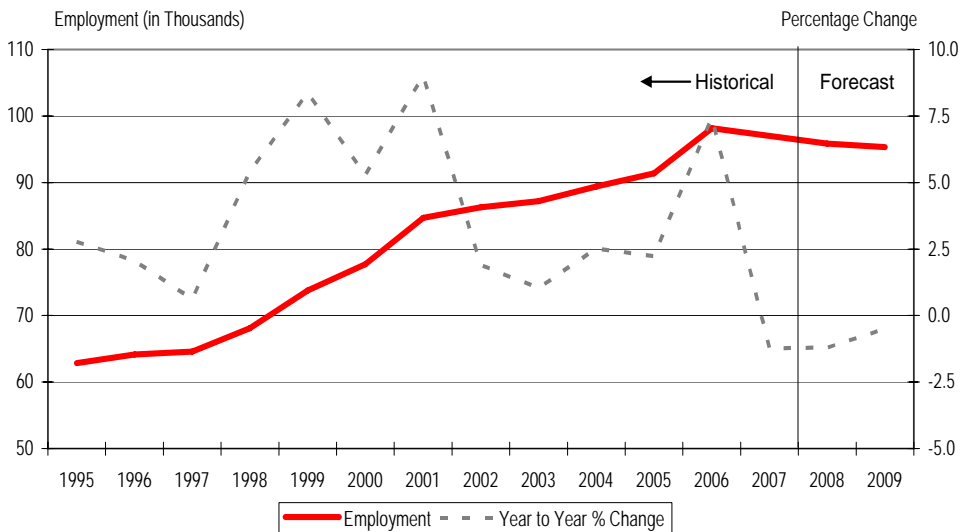
Arizona Leisure & Hospitality Employment



Arizona Government Employment



Arizona Other Services Employment



Note: All calculations are based on actual figures and then rounded to the nearest tenth for percentage change or the nearest hundred for employment.

Source: Historical Data - Arizona Dept. of Commerce, Research Administration, in cooperation with U.S. Dept. of Labor, Bureau of Labor Statistics;
Forecast Data - Arizona Dept. of Commerce, Research Administration, October 2008



**ARIZONA DEPARTMENT
OF COMMERCE**

The center for economic advancement

— Equal Opportunity Employer/Program —

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