Self Advocates Advisory Committee (SAAC)

TO: SAAC Members
From: Ning Yang, Chair
Date: July 1, 2014
Preparation for July 15 meeting

Here are some notes as you prepare for the July meeting:

1. Goal Setting. Here are some questions that can help you prepare for this continuing discussion.

In the State Council bylaws the following are listed as the Self Advocacy Advisory Committee's purposes. Do you feel the Committee already does this? If so, give examples. If not, give ideas on what needs to be done.

a. Advise the Council on ensuring self advocate participation and inclusion in all meetings.

Yes, the SAAC does this by:_____

No, the SAAC could do this:_____

b. Advise the Council regarding policies, programs and any other area affecting self advocates in California.

Yes, the SAAC does this by:_____

No, the SAAC could do this:_____

c. Review materials and other Council produced information to evaluate and make recommendations regarding plain language approaches.

Yes, the SAAC does this by:_____

No, the SAAC could do this:_____

Self Advocates Advisory Committee (SAAC)

Sherry will have additional information at the meeting on the disability awareness research. A sample is in your packet.

2. Boards for All material Be prepared to discuss whether you recommend the SAAC train ourselves on Board leadership basics with these materials.

If you would like some assistance in preparing your thoughts for the Goal Setting section of the meeting, feel free to contact the Council's Self-Advocacy Contractor to schedule some time:

Sherry Beamer, cell: 562-652-1759; beamers@capcinc.org

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Self-Advocates Advisory Committee (SAAC)
Meeting Minutes
May 28, 2014
Doubletree Hotel, Sacramento

Members Present	Members Absent	Others Attending
Nancy Clyde	Kecia Weller	Nancy Dow
David Forderer		Angela Lewis
Rebecca Donabed		Mark Polit
Kerstin Williams		Mary Agnes Nolan
Ning Yang		Sherry Beamer
Molly Kennedy (briefly)		Wayne Glusker
		Catherin O'Brien Peterson
		Dawn Morley
		Tammy Eudy
		Steven Kapp

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1. CALL TO ORDER

Ning Yang, Chairperson, called the meeting to order at 4:12 p.m.

2. ESTABLISHMENT OF QUORUM

A quorum was established.

3. **WELCOME AND INTRODUCTIONS**

SAAC members and others attending introduced themselves. New Council member Steven Kapp attended. He will most likely join the SAAC.

4. **PUBLIC COMMENT**

There were no public comments.

5. **APROVAL OF January 14, 2014 MEETING MINUTES**

Ning Yang asked for a correction to the minutes that member Kecia Weller was present. It was moved/seconded (Clyde / Williams) and carried to approve the January 14, 2014 meeting minutes. Ning reported that as there was not quorum at the March meeting there are no formal minutes to record.

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6. **SELECTION OF SSAN REPRESENTATIVE**

Ning reported that Brian Gutierrez is no longer on the Council, so a representative from SAAC to the Statewide Self-Advocacy Network (SSAN) needs to be selected for Council approval. Several members of the SAAC are already members of SSAN. David Forderder agreed to be the representative although he will periodically have scheduling challenges that will keep him from attending the statewide Network meetings. Ning will serve as David's back-up to the Network as needed. The SAAC passed unanimously that David

Forderer be recommended to the Council as the SAAC representative to the SSAN.

7. REPORT ON EMPLOYMENT FIRST COMMITTEE (EFC) MEETING

In Kecia Weller's absence Council staff to the EFC, Mark Polit, gave a brief report. The Committee is reviewing an Employment First handout; a brochure is forthcoming. Mark and Molly Kennedy will be drafting a policy on sheltered workshops and subminimum wage that will be reviewed at the June 17 meeting.

8. FACILITATION

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Ning reported that the Facilitation policy will be reviewed at the July Administrative Committee meeting. A draft policy has been written but needs to be converted to plain language.

9. PARLIAMENTARY PROCEDURE

Ning reported that one of her goals as SAAC Chair is to assure that Members can follow parliamentary procedure. She would like to pursue training by a registered parliamentarian. Ning provided each SAAC member with a copy of the booklet "The a-b-c's of Parliamentary Procedures" provided through CAPC, the self-advocacy contractor. She asked Members to review the Parliamentary Motions Guide in the packet and bring forward any questions with following the procedure.

10. GOAL SETTING

The Committee briefly discussed Goal Setting. An idea for a disability awareness program to schools was discussed. Steven Kaplan recommended that the Committee review such awareness programs that are currently available before committing to the goal. Ning asked Council Self-Advocacy Contractor to conduct a small research study for the Committee to present at the July meeting.

11. REVIEW OF COUNCIL PACKET

Mark Polit reviewed the May 28, 2014 Council Packet with the members.

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12. TOPICS FOR FUTURE DISCUSSION

Time did not allow for this agenda item.

13. ADJOURNMENT

Ning Yang adjourned the meeting at 6:02 p.m.

State Council On Developmental Disabilities

SSAN Report

Presented By
David Forderer
SCDD Representative To The SSAN
Area Board 7

Meeting Held
June 24, 2014
DoubleTree Hotel Sacramento, CA

On Tuesday June 24, 2014 I reported the following details about the events that have taken place at the State Council to the SSAN committee

1. The SCDD has established a new committee titled "Membership Committee". It's purpose is to assist the council in filling vacated seats. I was appointed a member of this committee by George Aguilar the former Chairman of the council.
   They had their first meeting this month which I was not able to attend due to a conflict.

2. The SCDD also established another committee called the State Plan Committee. It's purpose is to assist the council in overseeing and implementing the "State Plan"

3. The Administration Committee developed and produced a "Contract Purchasing" manual which was approved and adopted by the Council.

4. Dr. Michael Clark was appointed as interim director of the SCDD taking over the position from the previous director Roberta Newton who retuned to her Area Board as executive director.

The SSAN committee was well represented at this meeting by the members of the 13 Area Boards and was able to establish a quorum.

The committee had several long presentations and discussions regarding:

1. Creating a brochure and information sheet that could be used to publicize the SSAN committee and what it is and does

2. Becoming a independent nonprofit entity and what was necessary to accomplish that The main concern was the estimated length of time necessary to become a nonprofit; the consensus was between 4-5 years

3. Ted Jackson from the California Independent Living Centers gave a talk about qualifying for FREE high speed internet completing the digital access form. Those forms are in the packet

4. And last but certainly not least, all of the members present gave reports about the various events they have been involved with at their Area Boards

PLAIN LANGUAGE

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES FACILITATION AND ATTENDANT SERVICES GUIDELINES FOR NON-AGENCY MEMBERS

INTRODUCTION

The Council understands that some members may need reasonable accommodations to help them participate in meetings. To address this issue, the Council has set up guidelines on the support services for certain members who require facilitation and/or attendant services. These guidelines apply to all members except members who represent a government agency. Therefore, the following guidelines apply only to non-agency members.

When a member requires support, reimbursement is available for these services. The State Council on Developmental Services (SCDD) will provide payment for services provided by individuals working in the support classifications of facilitator or attendant Reimbursement for facilitation or attendant services must be reasonable and follow the State of California reimbursement rules. For guidance, Attachment A identifies costs for Facilitators and Attendants that have been considered reasonable based on factors such as the Council's pay rate of the Support Services Assistant, Hospital Worker, and Psychiatric Technician Assistant classifications.

DEFINITIONS

The following are definitions for facilitation and attendant services:

1. Facilitation is when a member gets help to perform the necessary functions of his/her position. Help is provided based on the needs of the member, and may include some or all of the following:

    a. Help explaining policy related information so it is more easily understood. This help can be either written down or explained verbally.

    b. Providing a breakdown of the important issues without taking any sides. This may include different positions and suggestions for voting for and against any particular position. The intent is to

provide the member with the knowledge necessary to make informed decisions.

c. Helping the member to effectively communicate both positions and questions on important issues.

d. Support to accomplish other related tasks, such as making travel arrangements and scheduling committee activities on behalf of the member.

2. Attendant service refers to assistance from others to independently perform activities of daily living. Services may include assistance with care and hygiene, mobility and escort responsibilities, and to a lesser degree, help with cognitive tasks such as help with reviewing and processing certain information.

3. Both facilitation and attendant services are defined as assisting the member to perform the important functions of his/her official position. For example, although an individual may need almost the same assistance from an attendant both in his/her home and while away on Council related travel, these guidelines address only those services directly related to doing the official job of a member.

RESPONSIBILITIES OF FACILITATORS AND ATTENDANTS

The need for, and level of, facilitation or attendant service should be determined largely by the member. During the new member's orientation to the Council, it is critical that the type of assistance available be clearly explained. The new member must be able to make an informed decision as to whether an accommodation is necessary.

It is important to stress that accommodations may include help other than facilitation or attendant services. While these guidelines address only these two forms of accommodation, other forms may be needed, such as enlarged print, modified seating arrangements, and ways of traveling.

A. FACILITATORS - RESPONSIBILITIES

Facilitators are responsible for providing services that enable the person to function as an important member of the Council. The following list includes some examples of activities with which the facilitator may assist:

1. Developing and maintaining a calendar of Council related meetings and activities that the member must attend. This may include assistance with following up on commitments.

2. Making transportation/travel arrangements for Council related meetings.

3. Obtaining and/or managing funds required for taking part in Council related meetings. This may also include follow-up in preparing any necessary paperwork. An example may be sending in receipts for cash advances or travel reimbursement claims.

4. Preparation prior to Council related meetings through review and interpretation of agenda items. Should the facilitator not understand an issue, he/she is responsible for obtaining any information necessary for clarification.

5. Support during meetings through interpretation of actions or discussions on agenda items. As with preparing for the meeting, if the facilitator does not understand an issue, he/she is responsible for making sure that it is clarified. Assistance may also be provided in following relevant group process rules, such as Parliamentary Procedure.

6. Reviewing after the meeting any actions taken or discussions held.

In addition to the facilitator responsibilities examples listed above, there are two important principles or ideas that a facilitator should follow when providing services.

The first idea is that while interpreting, the facilitator must accurately convey both the content and spirit of any spoken or written communication, while at the same time making sure that the information is in a format that is more easily understood. This may be especially difficult when the facilitator disagrees with what has been said or written. The facilitator is not responsible for the content of the communication, only for presenting it accurately.

The second idea follows after the first idea. While the person being served is an appointed member of the Council, the facilitator, is not. For this reason, the facilitator should not counsel, advise, or interject personal opinions while helping the member in

carrying out his or her official duties. Doing so may result in inappropriate participation and is not permitted by the facilitator.

B. ATTENDANTS - RESPONSIBILITIES

Responsibilities of attendants may include, but are not limited to, the following examples:

1. Assistance with personal maintenance and hygiene, which may include some or all of the following: dressing, grooming, eating, bathing, respiration equipment maintenance, and toilet functions such as bowel, bladder, catheter and menstrual tasks. Assistant assumes knowledge of the member's needs related to these tasks, and of other needs that may require only periodic assistance, such as what to do if the member experiences a seizure.

2. Assisting the Council member with traveling to and from Council related activities.

3. Assistance with mobility tasks, which may include helping the Council member to move from place to place within confined settings. Examples could include movement from a meeting room to a local restaurant or from one chair to another.

4. Assistance with some cognitive tasks, such as reading, money handling, making travel arrangements, simple clerical tasks, and some interpretation of difficult to understand information.

NOTE: Although attendants and facilitators may occasionally provide similar assistance with regard to cognitive (or "thinking") tasks, the attendant does so to a much lesser degree, and typically would not interpret issues related to policy development.

PERFORMANCE

Each member is responsible for deciding and judging the performance of the facilitator or attendant providing services to the member. Job performance of a facilitator or attendant is primarily determined by the unique needs of the Council member being served. Based on a self-assessment, the member specifies the type(s) of assistance that will be expected of the facilitator and/or attendant. Expectations are to be in precise terms and must be documented in writing in order to provide information for reimbursement. Each expectation, or task, once clearly defined, must be included in a checklist of tasks.

The task checklist will aid in identifying and documenting specific areas the Council member needs help with. For example, if the Council member indicates the need for a facilitator, the specific task(s) are also to be identified. Examples are assistance with making transportation/travel arrangements, interpretation of agenda items, and/or handling/managing funds. Similarly, a member may determine that he/she requires the aid of an attendant with three tasks: eating, bathing, and toileting. Further specificity may indicate that this member, for bathing, may require help with undressing and dressing, but not with washing, drying, or other remaining steps.

Additional information, worksheets, and sample checklists may be found in the Council's publication, "Facilitation: Purpose, Planning, and Practice." This publication may be accessed at: http://www.scdd.ca.gov/res/docs/pdf/SSAN/Facilitation.pdf

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ATTACHMENT A

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES FACILITATOR AND ATTENDANT SERVICES AND TRAVEL REASONABLE AND REIMBURSABLE PAYMENTS

SERVICES

When a non-agency member of the Council has determined that facilitator or attendant services are needed to assist them in performing his/her essential Council functions, the Council will authorize payment for facilitator or attendant services if those payments are reasonable under the State's reimbursement rules. For example, the following pay rates based on 2013 information compiled by the Department of Developmental Services have been determined to be reasonable and reimbursable:

SERVICE	PAY RATE
Facilitator	$13.09 per hour
Attendant	$13.46 per hour

The above pay rates are based on the mid-range monthly salaries of comparable state classifications. Each relevant salary was changed to an hourly rate and adjusted by 28.1 percent (the cost of state benefits) in order to deal with the self-employment cost to private vendors. Payment of these rates were limited to two hours before, during, and two hours after a Council related meeting.

Services Provided by Employees or Other Compensated Persons: If the facilitator or attendant is an employee of the Council, developmental center or regional center, or is already being compensated for the facilitation or attendant services, the Council will reimburse only for allowable travel related expenses.

Services Provided by Volunteers: If a member requires facilitation or attendant services and the facilitator or attendant is a volunteer, the council will authorize payment of travel related expenses for the volunteer.

TRAVEL

In accordance with PML 1986-001 entitled, "Travel Expenses of Non-State Employees," travel expenses of individuals providing facilitation or attendant services to a member may be reimbursed at rates equal to the rates allowed the member. Reimbursement for such travel expenses may be claimed on a travel expense claim which references the services provided and the name of the disabled member.

ATTACHMENT B

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES
FACILITATOR SERVICES TASK CHECKLIST

The task checklist will be used in determining the reasonableness of costs for facilitator and/or attendant services used by the member for purposes of reimbursement.

This facilitator services task checklist is to aid in identifying and documenting specific areas the member needs assistance with to enable him/her to fully participate in Council related meetings.

> Definition: Facilitation refers to a service wherein one person aids another to understand policy issues, to develop his/her own informed decisions regarding the issues, and to effectively express those decisions. A facilitator also assists with making transportation/travel arrangements, obtaining and/or managing funds required for attending Council related meetings, reviewing and interpreting agenda items, and providing support during meetings through interpretation of actions or discussions on agenda items.

In order to determine if the member requires the assistance of a facilitator, please indicate yes or no to the following list of Council related activities or functions:

1. Assistance is needed with the interpretation of policy related information, either written or verbal, into a form that is more easily understood.

   YES ___ NO____

2. Assistance is needed in making travel and transportation arrangements to attend Council related meetings and related functions.

   YES ___ NO____

3. Assistance is needed in obtaining and/or managing funds required for taking part in Council related meetings.

   YES ___ NO____

4. Assistance is needed in the interpretation of agenda items prior to meetings.

   YES ___ NO____

5. Assistance and support is needed during meetings with the interpretation of actions or discussions of agenda items.

YES ___ NO ___

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ATTACHMENT C

STATE COUNCIL ON DEVELOPMENTAL DISABILITIES
ATTENDANT SERVICES TASK CHECKLIST

The task checklist will be used in determining the reasonableness of costs for attendant services used by the member.
This attendant services task checklist is to aid in identifying and documenting specific areas the member needs assistance with to enable him/her to fully participate in Council related meetings.

> Definition: Attendant services refer to assistance from others which compensates for a person's inability to independently perform activities of daily living. Services may include assistance with personal maintenance and hygiene, mobility, and escort services.

In order to determine if the member requires the assistance of an attendant, please indicate yes or no to the following list of activities:

1. Mobility and escort services to and from meetings.

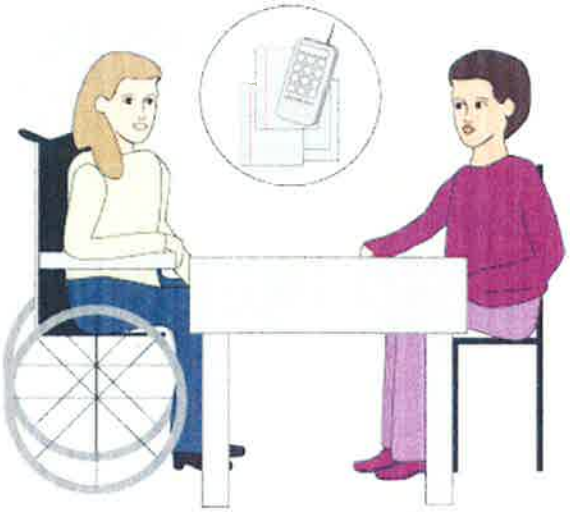
2. Activities of daily living (specify)

a.	Dressing	YES ___	NO____
b.	Bathing	YES ___	NO____
c.	Eating	YES ___	NO____
d.	Tilting	YES ___	NO ___
e.	Grooming	YES ___	NO____
f.	Respirator equipment maintenance	YES ___	NO____
g.	Other		

_____

3. Reading of materials YES ___ NO____

FACILITATION



PURPOSE – PLANNING – PRACTICE

The State Council on Developmental Disabilities gratefully acknowledges the assistance and feedback provided by many self-advocates who have served on governance boards, councils or advisory committees and support persons who have provided facilitation services.

We would like to extend special thanks to the Department of Developmental Services Consumer Advisory Committee and the State Council on Developmental Disabilities Self-Advocate Advisory Committee.

State Council on Developmental Disabilities

Scan the code with your phone to connect directly to the SCDD website, or go to http://www.scdd.ca.gov

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Facilitation and advocacy publications
http://brcenter.org/library

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From the Executive Director

The disability rights movement has demonstrated that individuals with diverse abilities can play an active and principal role in shaping public policy when provided with suitable support. However, it has often been difficult to provide appropriate assistance or accommodations to achieve this goal.

This guidebook was developed to emphasize a commitment to providing customized supports that promote inclusion and sustain meaningful participation in advocacy and governance groups. This assistance should be viewed as an investment in successful organizational outcomes by expanding the diversity of voices. It is strongly believed that increasing access to fuller participation for some, enriches opportunities for all.

The purpose of Facilitation: Purpose – Planning – Practice is to underscore the State Council's commitment to self and peer-advocate engagement in policy-making by providing a framework for councils, boards or committees who utilize meeting facilitators or mentors. This guide provides background and planning tools that lead to more effective accommodation for individual members as they carry out their responsibilities before, during and after meetings.

The guide draws from strategies developed by self-advocacy groups, tested facilitation practices and published resource materials.

Carol Risley
Executive Director
California State Council on Developmental Disabilities

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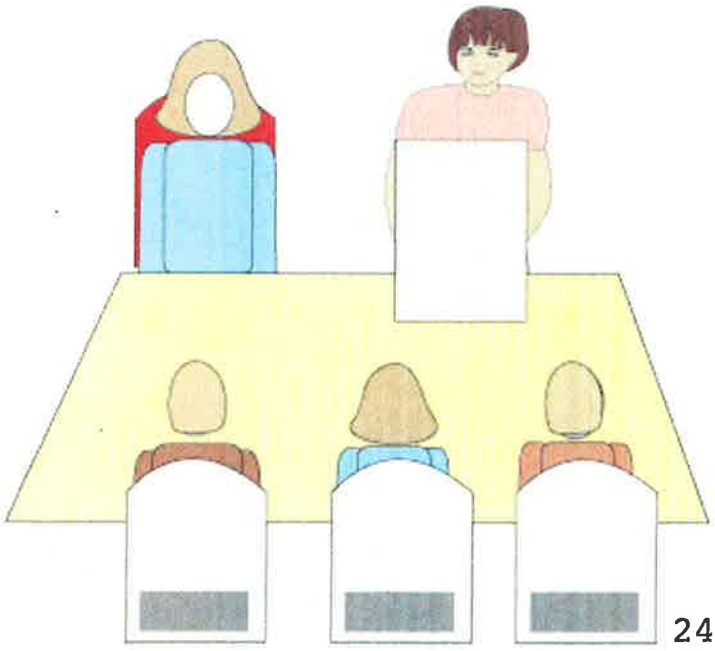
What Is Facilitation?

Facilitators provide personalized support to persons with diverse abilities serving on boards and committees.

Increased diversity is one of the greatest changes happening across society today. Many organizations are examining their policies and practices to address opportunities offered by the range of differences that make up their communities, such as race, ethnicity, gender, age, disability, family structure and more.

With the success of consumer and disability rights movements came service models that focus on the individual, with basic rights to speak and be heard. As a result, persons with varied abilities have joined advocacy groups, advisory committees or governing bodies that oversee services and supports. As organizations recognize the importance of including community members who use their services, it is clear that support in this leadership role is an essential accommodation.

As boards, committees or councils welcome diverse participation, it may be difficult for them to provide satisfactory support that allows all members to be heard.



Borrowing from other human service fields and the business community where a "facilitator" assists employees or small groups to find success, individualized support for board, committee or council members has come to be called "facilitation."

Think – Plan – Do

To ensure participation, meeting organizers, participants and their facilitators need to identify the type of support required by a member, develop a facilitation plan, and carry it out.

Think – Plan – Do, a straightforward process for planning and taking thoughtful steps to achieve success, is a helpful tool for any user. As a basic learning strategy, it can be applied to develop and implement a personalized facilitation plan for any member of a governing board, advisory committee or council.

Think – Plan – Do is easily utilized to identify group member responsibilities and support that will assist with effective participation.

THINK: What is required to be a successful board, committee or council member?

PLAN: Type of support needed to be an active and effective member.

DO: Take steps to carry out the facilitation plan.

Accessible Meetings

Meetings must have an understandable purpose and be structured to accommodate all participants.

Because boards of directors, committees and councils are structured to accomplish specific purposes, meeting organizers must be clear about the function of their groups. Whether organized to provide advice, deliver recommendations or take action, member responsibilities should also be clear for successful participation.

It is important that organizational leaders create ground rules for group process that include and support all meeting members. Typically, participants are expected to follow basic meeting rules that direct interactions and fulfill the purpose of the meeting. While helpful, these do not alone guarantee that meetings are accessible to individuals with diverse abilities.

> "Facilitation is a functional equivalent of a wheelchair, personal attendant, communications computer, or ramp."
>
> *1989 (Capitol People First)*

Meeting organization and practices should be designed to ensure that all participants have equal access to information, opportunity to participate, and responsibility to carry out duties.

Accessible Meetings

Because boards of directors, committees and councils are structured to accomplish specific purposes, meeting organizers must be clear about the function of their groups. Whether organized to provide advice, deliver recommendations or take action, member responsibilities should also be clear for successful participation.

It is important that organizational leaders create ground rules for group process that include and support all meeting members. Typically, participants are expected to follow basic meeting rules that direct interactions and fulfill the purpose of the meeting. While helpful, these do not alone guarantee that meetings are accessible to individuals with diverse abilities.

Meeting organization and practices should be designed to ensure that all participants have equal access to information, opportunity to participate, and responsibility to carry out duties.

Think: Do our meetings accommodate members' needs?

Plan: Restructure meeting schedules, processes and practices to better include all members.

Do: Gather input from members and carry out restructuring.

Group Facilitation

Member participation is affected by both the meeting leader's style and the process. Traditional meeting procedures and communication methods may need to change to hear contributions from all members. Leaders may need more open approaches, or provide more time for discussion and interactions among group members.

Inclusive practices by meeting leaders to ensure participation:

✔ Direct a reasonable pace and adequate time for meeting business.

✔ Check-in with members for general understanding by all group members.

✔ Provide multimedia presentation of topics. Provide practical examples.

✔ Summarize significant points, positions, actions.

✔ Monitor group discussion so all members have opportunities to contribute.

✔ Use plain language to ensure better understanding .

✔ Rely less on traditional meeting format, modify schedules, rules.

✔ Be observant! Check in with members to see if a break is needed.

✔ Provide time for interactions between meeting members.

Finding Support

Organizations reinforce inclusive practices by using meeting mentors. Experienced members volunteer to provide support to new participants who may require assistance to be successful.

Mentoring is a strategy that provides encouragement and instrumental support in "learning the ropes," and becoming more engaged with the group. Using mentoring as a natural support helps all participants know what is expected of them and their responsibilities as group members.

The mentoring process provides an opportunity of increased communication between members outside of regular meetings. The experienced board member can share ways of adjusting to demands of board participation and help prevent a new member from feeling overwhelmed or isolated.

Mentor strategies may include:

✔ Introduce the new member to others and encourage social connections.

✔ Familiarize a new member with the organization and its structure.

✔ Meet with a new member to review agenda and action items.

✔ Review meeting outcomes and follow-up responsibilities after the meetings.

✔ Explain background on issues presented at meetings.

Finding Support

For the Person Mentored:

Mentors are interested in every member being successful and a contributor to the meetings and organization. As a natural support, he or she is experienced in areas that a new member may not be. A mentor leads by example to help other members understand the organization and how meetings are conducted. When working with a mentor, keep in mind they are volunteering and are not paid meeting facilitators.

Member Responsibilities when Working with a Mentor:

Think: What assistance is needed from a mentor to be a successful?

Plan: Create a plan with a mentor.

Do: Take steps to accept guidance from the mentor.

Remember to:

✔ Follow agreements. ✔ Ask questions. ✔ Share ideas and concerns.

Member and Mentor Teams:

✔ Interview each other to make sure the team wants to work together.

✔ Meet on a regular basis and plan how to work together.

✔ Encourage social relationships and information-sharing among members.

Facilitation Basics

Facilitation is support that meets the individual needs of a member so he or she can perform the general functions of the board, committee or council position. It includes:

BEFORE

- ✔ Study the meeting materials to provide knowledgeable support.
- ✔ Assist member to prepare by reviewing meeting materials, explaining and adapting materials.
- ✔ Provide impartial analysis of issues, when needed.
- ✔ Help member identify questions and positions on issues that will be brought up at the meeting.

DURING

- ✔ Explain meeting materials and related information.
- ✔ Explain concepts, terms, acronyms, etc.
- ✔ Take notes on key issues, discussions, action items.
- ✔ Provide guidance on meeting process, agenda items and actions.
- ✔ Assist with communicating comments, positions, votes.

Facilitation Basics

A facilitator must be prepared in order to successfully assist members.

AFTER

- ✔ Review notes from meetings.
- ✔ Provide copy of the meeting notes to member in their preferred format.
- ✔ Review actions taken at meetings and important discussions.
- ✔ Assist with related tasks, such as travel arrangements and calendars.
- ✔ Follow-up on assigned duties.

Think: What is needed before, during and after meetings?

Plan: Create preparation schedule and agree on facilitation strategies using facilitation worksheets at back of the book.

Do: Carry out schedule and facilitation support.

Partnerships

Effective facilitators are flexible, willing to learn, and knowledgeable about the organization.

Successful facilitation depends on a respectful partnership between a facilitator and a member. The facilitator extends him or herself by providing support effectively so the member is confident and productive.

Before beginning facilitation, it is helpful to observe a meeting to learn about the process and significant issues facing the organization.

- ✔ Get to know each other's needs, skills, values, preferences.
- ✔ Give and receive constructive help.
- ✔ Give and receive "pats on the back."
- ✔ Preserve privacy.

Facilitation involves assistance the member can understand and learn from, and is always done with a tactful and respectful approach. Choosing moments carefully during meetings to promote independence is critical for the member to be a connected participant.

Knowledge and Skills

A Facilitator

1. Has knowledge about the organization, type of meetings, role of members (or will obtain).
2. Has knowledge about meeting rules and procedures (or will obtain).
3. Supports member with making "informed decisions."
4. Adapts meeting materials and explains related information.
5. With member, creates strategies for assisting before, during and after meetings.
6. Encourages member inclusion during meetings.
7. Is flexible and adapts to changing needs of member.
8. May act in these roles:

Note Taker—Take notes using accessible plain language the member desires.

Meeting Coach—Guide the member on meeting structure and rules.

Adaptation Specialist—Provide materials the member understands.

Scheduler—Assist the member to maintain meeting calendar.

Researcher—Find information the member may need for meetings.

Code of Ethics

Facilitators support members without influencing them with their own opinions or beliefs.

A productive partnership between the member and facilitator extends mutual respect, trust and dependability. It is important that both facilitator and member observe workplace boundaries so the member contributes and the facilitator performs professionally.

While challenging at times, a facilitator must avoid any influence of their own personal beliefs, opinions or conflicting interests. This requires a facilitator to be self-aware and be a watchful partner, not a self-promoter. While another party may be a facilitator's "employer of record," the member is a facilitator's "boss" and responsibility to that arrangement must be remembered.

- ✔ Avoid influence on the member's voting and decision making.
- ✔ Avoid speaking up or acting "like a member" at meetings.
- ✔ Recognize you may not always agree, and address in a respectful manner.
- ✔ Acknowledge and address barriers faced in being a facilitator.
- ✔ Do not use the organization or facilitation position for personal advantage.
- ✔ Maintain confidentiality, do nothing to violate the trust.
- ✔ Maintain confidentiality regarding discussion and decisions from "closed" meetings.

Resources

PLAIN LANGUAGE

Center for Plain Language
Nonprofit organization promoting the use of plain language in the public and private sectors. http://www.centerforplainlanguage.org

Is it Plain? A Manual for Language Writers (2001). Janet Pringle. Vocational and Rehabilitation Research Institute, 3304 33 Street N.W. Calgary, Alberta T2L 2A6.

Plain Language Action & Information Network
Promotes plain language for all government communications. Strategies to improve communication from the federal government to the public. http://www.plainlanguage.gov

ACCESSIBLE MEETINGS

Accommodations and Supports for Including Special Populations in Leadership and Decision Making Activities (2002). NY State Developmental Disabilities Planning Council. http://tcsip.tarjancenter.ucla.edu/docs/AccommodationforSpecial_Populations.pdf

Board Resource Center (BRC) "Making Complex Ideas Simple"
Advocacy publications and media emphasizing strategies that ensure inclusive boards and committees. Focus group developed tools, using graphics and plain language developed for public agencies. Download library available http://brcenter.org/lib_library.html

Developmental Disabilities Planning Council's Promoting Leadership Opportunities Demonstration Project (2002). Esther Kabuga and Cheryl Spear. Technical Assistance and Resource Center, Center on Human Policy, Syracuse University, 805 South Crouse Syracuse, NY 13244-2340.

Facilitation: A Ramp to Success. Tools to Assist Members with Effective Participation (2006), Supported Life Institute (for Alta California Regional Center). 2035 Hurley Way, Suite 250 Sacramento, CA 95825 (916) 567-1974.

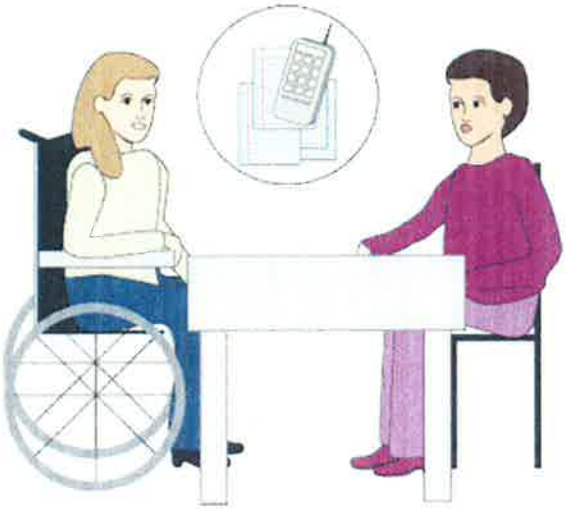
Get on Board and Make a Difference: Effective Practices for Including People with Developmental Disabilities and New Members on Boards and Committees. Green Mountain Self-Advocates and the Arc of Vermont http://www.ddas.vermont.gov/ddas-publications/publications-dds/publications-dds-documents/dds-publications-advocacy/dds-advocacy-get-on-board

The Guide: NASDDDS Handbook on Inclusive Meetings and Presentations (2006). National Association of State Directors of Developmental Disabilities Services. 113 Oronoco Street Alexandria, VA 22314 (703) 683-4202. http://www.nasddds.org

Making Meetings Accessible: How to Enable Real Participation. Vermont Division of Disability and Aging. (802) 241-2614.

Not Another Board Meeting: Guides to Building Inclusive Decision-Making Groups (1995). Oregon Developmental Disabilities Council.

FACILITATION



PURPOSE – PLANNING – PRACTICE

Facilitation Plan

All members of boards, committees and councils must be able to participate equally and make informed decisions. It is important that members who need assistance on a board, committee or council be encouraged and made aware that accommodations are available to enhance their participation.

The following worksheets are designed as a self-survey that addresses a range of facilitation support needs to help identify the type and amount of support that may be useful. The worksheets are designed to be completed by the member and facilitator. Discussion by the facilitation partners is an important component of the self-survey. It provides an opportunity to learn how the team will work together and best ways to provide support.

Facilitation Worksheet

Facilitator and Member to complete.

Organization:

1. Does the organization have a job description for facilitators? (If so, review)

_____

_____

2. Can the organization or meeting leader add the facilitator to important mailing lists?

_____

_____

3. What adaptations does the member currently use at work or home?

_____

_____

4. Would these adaptations be useful at meetings? (Which ones)

_____

_____

5. How will personal care needs be met, if required?

_____

_____

6. Is there specific support the member wants? (List)

_____

_____

Facilitation Worksheet

Facilitator and Member to complete.

Personal Needs:

1. Mobility (walking, help with stairs and elevators, transferring in/out of wheelchair, opening doors, etc.)

   Support I want:

   _____

   _____

2. Meeting Site (location, contact information, meeting room, bathroom)

   Support I want:

   _____

   _____

3. Transportation (making arrangements)

   Support I want:

   _____

   _____

4. Hotel Accommodations (accessible room, locating people, meeting room, etc.)

   Support I want:

   _____

   _____

5. Food and Drink (assistance with meals, eating or drinking)

   Support I want:

   _____

   _____

Facilitation Worksheet

Facilitator and Member to complete.

Personal Needs:

6. Medication (reminders to take, and medication effects)

   Support I want:

   _____

7. Personal Appearance
   - ❑ Grooming
   - ❑ Professional Image
   - ❑ Hygiene

   Support I want:

   _____

8. Bathroom Assistance (opening doors, transferring, etc.)

   Support I want:

   _____

9. Transportation (arranging: public, private, special)

   Making arrangements _____

   Paying for transportation _____

   Waiting until ride arrives _____

   Support I want:

   _____

10. Other:

    Support I want:

    _____

Facilitation Worksheet

Facilitator and Member to complete.

Member Duty Needs:

1. Understanding organization's structure and process

   - ❑ How meeting is run, Robert's Rules
   - ❑ Review by-laws or operating rules
   - ❑ How members communicate with each other and make decisions
   - ❑ How the meeting makes decisions

   Support I want:

   _____

2. Reviewing materials for the meeting

   - ❑ Minutes
   - ❑ Agendas
   - ❑ Action items
   - ❑ Other materials in packet

   Support I want:

   _____

3. Speaking up

   - ❑ Talking about ideas before meetings
   - ❑ Highlighting main points to talk about
   - ❑ Preparing statements, reports

   Support I want:

   _____

Facilitation Worksheet

Facilitator and Member to complete.

Member Duty Needs:

4. Asking questions and making comments

- ❑ Writing down questions or comments to bring to meetings
- ❑ Making sure my points get across to the group
- ❑ Remembering at the meeting:
  - ❑ ask my question
  - ❑ make my statement

Support I want:

_____

_____

_____

_____

5. General Reminders

- ❑ Completing calendars, meeting dates and times
- ❑ Making phone calls and writing emails
- ❑ Getting information
- ❑ Completing assigned work
- ❑ Bringing materials to meetings

Support I want:

_____

_____

_____

_____

Facilitation Worksheet

Facilitator and Member to complete.

Member Duty Needs:

6. Making materials understandable

   Adaptations:

   - ❑ large print
   - ❑ pictures only
   - ❑ Braille
   - ❑ pictures and text
   - ❑ computer disk
   - ❑ language translation
   - ❑ plain language: easy-to-understand words

   Support I want:

   _____

7. Reading materials

   - ❑ Turning pages, highlighting main points
   - ❑ Writing summaries
   - ❑ Reading materials aloud
   - ❑ Explaining hard-to-understand language
   - ❑ Explaining acronyms or new terms

   Support I want:

   _____

8. Taking notes

   - ❑ Writing down important points, actions, decisions
   - ❑ Take notes on paper or a computer
   - ❑ Explaining notes

   Support I want:

   _____

Facilitation Worksheet

Facilitator and Member to complete.

Professional Needs:

Do you want help with:	**YES**	**NO**
UNDERSTANDING HOW THE GROUP WORKS		
Ground rules	❑	❑
Voting procedures	❑	❑
Meeting structure	❑	❑
Remembering people and their jobs	❑	❑
Staying on topic	❑	❑
DECIDING WHAT IS MOST IMPORTANT TO DO		
Which project to do first	❑	❑
Which projects or committees to join	❑	❑
REVIEWING OR READING MEETING MATERIALS		
Minutes	❑	❑
Agendas	❑	❑
Action items	❑	❑
Additional information	❑	❑

Facilitation Worksheet

Facilitator and Member to complete.

Professional Needs:

Do you want help with:	**YES**	**NO**
REMEMBERING THINGS		
Meeting times	❑	❑
Scheduling the calendar	❑	❑
Making phone calls	❑	❑
Writing letters	❑	❑
Finding information	❑	❑
Completing assigned work	❑	❑
Bringing materials to meetings	❑	❑
COMMUNICATION		
Using the phone	❑	❑
Leaving messages	❑	❑
Helping others understand me	❑	❑
Sending or receiving emails	❑	❑
Printing emails	❑	❑

Facilitation Worksheet

Facilitator and Member to complete.

Professional Needs:

Do you want help with:	**YES**	**NO**
DOCUMENTS		
Signing documents	☐	☐
Signing my name with permission	☐	☐
Explaining what needs to be signed (and what the document means)	☐	☐
READING MATERIALS		
Reading materials aloud	☐	☐
Reading together during prep time	☐	☐
Putting important written ideas into pictures	☐	☐
UNDERSTANDING NUMBERS		
Showing numbers as pictures (chart/graph)	☐	☐
Writing numbers as words	☐	☐
Removing zeros, rounding off	☐	☐
Understanding meaning of the numbers	☐	☐
REMEMBERING IMPORTANT INFORMATION		
About members of board, committee, council	☐	☐
Things I have read	☐	☐
Important discussions	☐	☐
Questions to ask	☐	☐
Comments to make	☐	☐

Other:

_____

_____

Facilitation Worksheet

Facilitator and Member to complete.

Partnership:

The best way for us to:

Communicate between meetings

_____

_____

_____

_____

Work together at meetings

How do we sit at meetings? (at the person's side, in the audience, etc.)

_____

What kind of cues to use during the meeting? (physical, pointing, verbal, writing)

_____

How will the member present positions/statements at meetings? (speak independently, with assistance, read member statements)

_____

Make adaptations

_____

_____

_____

_____

Facilitation Worksheet

Facilitator and Member to complete.

Summary Page:

Personal Needs:

_____

_____

_____

_____

Member Duty Needs:

_____

_____

_____

_____

Professional Needs:

_____

_____

_____

_____

Facilitation Worksheet

Facilitator and Member to complete.

Agreement

As partners we will communicate openly and honestly with each other.

As the member, I agree to:

a. Work as a partner with my facilitator.

b. Communicate when I have questions or concerns about facilitation.

c. Be prepared and professional.

d. Communicate when I need to change my plan.

e. Respect confidentiality of the facilitator.

f. Other

_____

_____

As the facilitator, I agree to:

a. Work as a partner with the member.

b. Communicate when I have questions or concerns about facilitation.

c. Be prepared and professional.

d. Respect confidentiality of the member.

e. Other

_____

_____

_____

signature (member) date

_____

signature (facilitator) date

_____

signature (organization) date

Make copies for facilitator and organization

Sample of Disability Awareness Program effectiveness research.

Most research found to date is specific to a program.

RESEARCH STUDIES SUPPORT EFFECTIVENESS OF THE KIDS ON THE BLOCK PROGRAMS

Over the last two decades, numerous studies have been conducted to determine how effectively the Kids on the Block educational system achieves its goals of educating young audiences about differences, disabilities and social issues. The studies range from informal questionnaires and evaluations to formal research studies conducted by trained researchers. The results have been positive and attest to the effectiveness of the Kids on the Block's unique education presentation.

1) "A Study of an Effort to Modify Non-handicapped Students' Attitudes Toward the Handicapped"

A doctoral thesis by Sarah Gaddy Hawkins Grider, Ed.D., The College of William and Mary, Williamsburg, Virginia, May 1985

Fifth and sixth grade students from public schools in Northern Virginia viewed Kids on the Block performances on blindness, mental retardation, learning disabilities, emotional disorders and cerebral palsy. They participated in approximately five hours of follow-up activities (role-playing, disability simulation, etc.) developed by The Kids on the Block. Before and after being exposed to the program, students completed tests designed to determine a change in attitude. Additionally, the researchers administered a follow-up test four weeks after the performances to determine if the Kids on the Block program had produced lasting attitudinal changes.

Conclusion:

- Negative attitudes toward people with disabilities can be altered. "Results obtained supported the findings of previous studies which suggested that negative attitudes toward the handicapped can be altered."

- The Kids on the Block puppetry program was a successful method for instilling positive attitudes toward the handicapped in non-handicapped students. "Students receiving the educational intervention (The Kids on the Block presentation) differed significantly in attitude change scores from the students who did not. This was interpreted to mean that the intervention positively affected attitudes toward the handicapped." Moreover, "...the positive results obtained imply the effectiveness of The Kids on the Block and reinforce the efficacy of some of the intervention strategies incorporated by The Kids on the Block."

- The Kids on the Block had a positive effect that was maintained over time. "The improvement in attitude change scores made by the group receiving the intervention...was maintained from post test to delayed post test indicating relatively stable treatment effects."

2) "The Use of Puppetry to Modify Non-handicapped Students' Attitudes Toward the Handicapped"

A study by Pauline Haugland, a graduate student in education at California State University, Los Angeles, California, 1986

Third, fourth and fifth grade students at a Los Angeles, California elementary school viewed a Kids on the Block performance on cerebral palsy, blindness, deafness and mental retardation. Afterwards, a test to determine whether an attitude change had occurred was administered to these students as well as to a control group that had not viewed the performance.

Conclusion:

- "...there was a significant change in attitude as a result of the influence exerted by The Kids on the Block."

- The study had also attempted to determine whether the attitudes of boys and girls would be affected differently by the program. However, the study found no detectable difference in attitude according to gender.

3)"Examining the effectiveness of one innovative program with the goal to improve the knowledge and attitudes of elementary school aged students toward the disabled using THE KIDS ON THE BLOCK puppet approach"

A study by Fern Snart, Ph.D., special education professor with the University of Alberta, Edmonton, Alberta, Canada, 1993

The presentation of a questionnaire involving knowledge and attitudes, both before and after a scheduled KIDS ON THE BLOCK puppet performance in selected third grade classrooms in Edmonton, Alberta, Canada.

Objective:

- The development of an assessment device which could provide information about the factual knowledge and general feelings/ attitudes which elementary school aged children possess toward their peers who are disabled.

- The use of this instrument to examine knowledge and attitudes of third grade students both before and after a school performance of THE KIDS ON THE BLOCK puppet educational program.

Conclusion:

- Responses indicated a significant increase in factual knowledge, with 17 of 25 knowledge-based questions having statistically different responses at the time of post-test.

- Attitudes of the children were more "positive following the puppet presentation."

- The results strongly suggest that an educational system such as KIDS ON THE BLOCK puppets may represent an effective medium through which young children can learn about disabilities, "...and perhaps develop a more positive feeling about their peers who are disabled."

4)"The Effectiveness of the Kids on the Block Program in Increasing Children's Knowledge of and Attitudes Toward Individuals with Disabilities"

research conducted by Jean M. Schumacher, M.A., J. Michael Leibowitz, Ph.D. and David W. Furst, Ph.D. with the University of Nebraska at Omaha, Omaha, Nebraska, 1997

"This study is a large scale evaluation of the Kids on the Block program. Subjects included second and fifth grade children from 13 schools in a large midwestern city. Two outcome measures were used to measure children's knowledge of and attitudes toward individuals with disabilities. A one-month follow-up was also conducted."

The researchers used two tools to evaluate the program. Children's Knowledge about Handicapped Persons Scale which is a 24 question true and false measurement to "assess children's beliefs concerning persons with disabilities," and the Children's Social Distance from Handicapped Persons Scale which assesses "how close a child is willing to get to disabled peers."

"The analysis indicated that for both the Knowledge and Social Distance Scales the students in the experimental group showed significant improvement at post-test and follow-up compared to the control group. This preliminary analysis indicates that the Kids on the Block program can effectively improve students attitudes toward persons with disabilities, as well as increase their knowledge of disabilities. Improvements in scores were seen in both second and fifth grade, and for both male and females."

Conclusion:

- "This study suggests that Kids on the Block is an effective and easily implemented program to improve student attitudes towards individuals with disabilities. If attitude change results in behavior change, having students participate in a Kids on the Block performance could improve the quality of interactions between the disabled students and their non-disabled regular education peers, thereby improving their educational experience and the quality of the learning environment for all students by reducing stigmatization and labeling."

Boards for All

Background

"Human Rights" mean all people have equal opportunities to have good lives and the freedom to make choices. The United Nations Convention (treaty) on the Rights of Persons with Disabilities protects these basic rights for persons with disabilities. Countries that agree must support equal rights under the law.

When information is difficult to understand or read, people do not know about their rights or how to be involved in their communities. In the past many people were left out because rules about benefits were provided using hard to understand words or ideas.

Now, organizations are changing the way they do things. They see the value of including people with different abilities and backgrounds because of what they can offer. Boards of directors and government agencies are changing their policies. They are creating materials in plain language and easy to follow designs so more people can understand their rights.

Materials in "plain" language must be available. Having information in ways people understand is an important key to enjoying equal opportunities and participate as leaders in their communities.

When President Barack Obama signed the Plain Writing Act of 2010, he sent a message about "clear Government communication that the public can understand and use." In 2011 he also sent an Executive Order that says "our regulatory system must ensure that regulations are accessible, consistent, written in plain language, and easy to understand." People with different experience can be valuable advocates when they have understandable information.

Regional Centers, through the state of California, work to improve life for thousands of persons with disabilities across the state. The Lanterman Act, the law that created this system, outlines what regional centers do. It also states their boards of directors must have members who come from the community, with some being persons with disabilities and their families.

Boards for All helps any community member learn about being involved in leadership as a member of a board of directors, committee or community council. With this easy-to-use training, doors can be opened for many more people. Community members who did not think about this opportunity before, can now find out how to play a role in this important work.

Boards for All is an online webcast training with easy-to-follow plain language videos and worksheets. These tools help teach basic rules about how boards of directors and their committees work. The training also explains the importance of board member support called facilitation and meeting mentors.

The training includes five short videos with worksheets on these topics:

- Board of Directors
- Role of Board Members
- Purpose of Committees
- Board Development
- Facilitation and Mentoring

Collaborators

Board Resource Center

BRC helps organizations make inclusion happen by teaching how to be effective leaders. Most important, is working together to show boards of directors, committees and councils how to make complex ideas simple using understandable information, so people are included and valued.
http://www.brcenter.org

California State Council on Developmental Disabilities

SCDD is established by state and federal law to ensure people with developmental disabilities and their families receive the services and supports they need. It is composed of individuals with a developmental disability, family members and representatives of State agencies. Members are appointed by the governor.
http://www.scdd.ca.gov

Eastern Los Angeles Regional Center
ELARC is a private, not-for-profit corporation contracting with the state of California to provide services to persons with developmental disabilities. The volunteer board of directors includes persons with disabilities, parents and community members. Together they work to ensure the agency's mission is carried out.
http://www.elarc.org

The SCILS Group
SCILS helps serve community organizations by teaching about person-centered thinking, and ways to assist people with disabilities to be involved in their community.
http://www.scilsgroup.org

Board of Directors

This worksheet provides an opportunity to think about being a member of a board or council.

Instructions

1. Read the information on each page.
2. Complete the questions.
3. Bring the completed worksheet to share at your next meeting.
4. Ask for help, if you have any questions.

Board of Directors

What is a Board of Directors or Governing Council?

A Board of Directors or Council is a volunteer group that oversees an organization and helps to carry out its mission. It is legally and financially responsible for how the organization operates.

While board members differ in background and knowledge, they share a commitment to the success of their organization.

Many people volunteer as board members because they have experience with the organization or an advocacy issue and want to make a contribution.

Please Complete

If someone had never heard of a "Board of Directors," how would you describe it?

_____

_____

_____

Board of Directors

What is a Mission Statement?

It is the heart of an organization.

A mission statement describes the overall goal and purpose of activities, while providing direction. A mission statement explains who the organization serves. It guides development of policies and strategies that direct what and how services are provided.

Please Complete

What is the mission statement of the organization?

_____

_____

What Does a Board of Directors do?

A board meets regularly to review how the organization is carrying out its work. It oversees finances, votes on policies, seeks support from the community and plans for the future.

Board members must be willing to learn new skills and stay informed so they can be effective decision makers. Each board member must ask questions and look for explanations when issues are not understood.

Please Complete

What are basic board member responsibilities?

_____

_____

_____

Board of Directors

Conflict of Interest

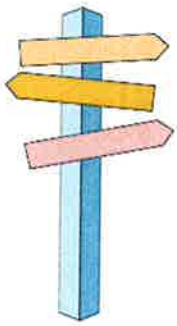
Conflicts of interest exist when a board member votes on issues that may result in personal benefit. This can include making money as a result of a board decision. It is important that members avoid all conflicts of interest.

Please Complete

Describe a possible "conflict of interest."

_____

_____



Code of Conduct

After any board decision is made, members stand by the action and speak with one voice. Board members always act in the best interests of the organization and represent it everywhere they go. They connect to the community by telling friends, associates and groups about the work the organization does.

When a board conducts business in a "closed session," members must keep this information confidential.

Please Complete

What does "speak with one voice" mean for board members?"

_____

_____

What is a closed session?

_____

_____