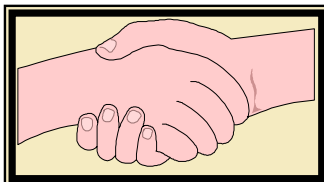


**Beyond Tokenism:  
Partnering with People with Diverse Abilities  
On Consumer Advisory Boards**



**Best Practice Guide**

2004

**Developed by Judith Stevens, M.Ed. and Barbara Ibañez, M.A.**  
Center for Development and Disability Partnership Initiative Project



**Center for Development and Disability, Health Sciences Center  
University of New Mexico (CDD)**

**University Center for Excellence in Developmental Disabilities Education,  
Research, and Service (UCE)**

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*With the Support and Expert Input of*  
**Center for Development and Disability  
Consumer Advisory Board Members**

On the Web at: <http://cdd.unm.edu/cab/updates.html>

**And All Our Other Partners**

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## Introduction

University Centers for Excellence in Developmental Disabilities Education, Research, and Service (UCEs) are required by law to convene Consumer Advisory Councils. One important constituency that must be represented on these Councils is people with developmental disabilities. This guide offers strategies to build effective partnerships with people with cognitive disabilities and to support their full participation in Advisory Councils.

It is one thing to convene a body to meet a regulation and another to develop real partnerships with individuals with cognitive disabilities. It is one thing to see a person's disability and another to recognize, support and respect each person's diverse abilities. For this reason, we honor the great gifts and expertise that people with cognitive disabilities have by referring to them as "self-advocates" or "people with diverse abilities" throughout this guide.



This Best Practice Guide includes practical information and strategies, proven effective through experience, for forging full membership. We start with acknowledging the many partners who helped build this model. Next, we share key values and define tokenism. After that, we describe the benefits of partnering with people with diverse abilities. Then, we share a number of proven "best ideas". We close with "Tools for Success" that support partnership. References for further reading are provided at the end of the guide. This model can be applied to Consumer Advisory Councils as well as other groups.

We share this information with you in hopes that we all can continue to move beyond tokenism to true partnerships.

*For more information about this guide, please contact us at:*

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Learn more about the Center for Development and Disability by visiting the CDD website at:

<http://cdd.unm.edu>

## Acknowledgements: Together We are Stronger



Many self-advocates and family members helped build this model. A special thanks to Jon Peterson, CDD CAB self-advocate member, who helped refine this model through his excellent input creating and co-facilitating multiple state and national presentations. Thanks to the active members of the Center for Development and Disability Consumer Advisory Board (CDD CAB) who contributed time, creativity and feedback to strengthen this model.

Meet the current CDD CAB members at:

<http://cdd.unm.edu/cab/members.html>

Also, thanks to Marilyn Martinez (self-advocate), Tony Husted (family member), and Randy Constales (advocate), for their contributions as part of the CDD partnership strategic planning work group.

Other UCEs gave valuable mentoring as we intensified our quest to move beyond tokenism. Oklahoma's Jan Moss generously shared concepts such as: recruiting for constituencies, position descriptions, and family as faculty. Georgetown's Rosalind German contributed ways to build community, support participation and build skills. Wyoming's Susan Bentley and Kendall Corbett shared their experience of the power of employing people with disabilities and family members. Also, thanks to the nearly 30 UCE representatives nationally and our friends in Canada who have networked with us to strengthen partnership efforts.

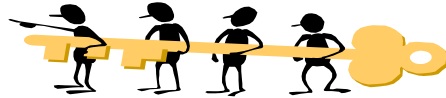
Many CDD staff members, who include self-advocates and family members, were essential contributors. CDD Director, Dr. Cate McClain, and Associate Director and family member, Judith Liddell, committed staff time and core funding to a two-year Partnership Initiative that enabled the authors to refine this model. They also provided unwavering leadership to assure that the CDD moved beyond tokenism. CDD Program Managers and senior leadership, the CDD Aligning Group, offered united support and useful ideas.

We are honored to pass on the valuable ideas so many people have inspired.

**Together we are stronger!**

## Key Values

This model is based on these key values:



- **Vision:** Unified vision is essential and powerful to success.
- **Ownership:** Taking the time to achieve whole organization commitment creates ownership, increases effectiveness, and, ultimately, saves time.
- **Contribution:** People with diverse abilities have important, valuable and diverse abilities, life expertise, and gifts to contribute.
- **Constituency:** An advisory group that represents diverse constituencies is a stronger advisory group.
- **Quality:** Seeking continuous input and feedback from customers an organization serves increases the quality of what the organization offers and customer satisfaction.
- **Partnership:** Partnerships with multiple organizations, both locally and nationally, strengthen outcomes and capacity.
- **Support to Success:** Processes, equipment, language, buildings, supports, meetings and other key elements must be individually accessible. Identifying, honoring and supporting individual learning and communication styles, capabilities, and preferences is an important part of cognitive accessibility.
- **Nothing About Us Without Us:** Employees and others with diverse abilities as well as family members are essential to model development and refinement.
- **Continuous Refinement:** Continual refinement based on field-testing, feedback and expert input is essential to quality.
- **Universality:** Efforts to become accessible to people with diverse abilities make things better for everyone.

## What is Tokenism?

A token is a substitute for a real thing - for example, a subway token instead of a real coin. People with disabilities can be treated as Advisory Board tokens, rather than as real, contributing, valued members. This tokenism manifests in many ways, for example:



**Keeping People in Boxes:** Blocking people from identifying and doing what they can and choose to do.

**Just for Looks - Seen, Counted, but Not Heard:** Meeting legal and funding requirements that people with disabilities be present, but not listening or inviting these people to contribute.

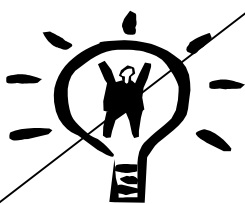
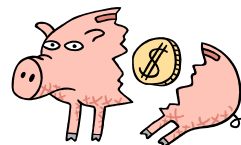


**Disability Not Diverse Abilities:** A lot of people see a person for their disability label rather than who they truly are as a whole person. Recruiting only for the disability, not for the person's unique capability, experience and gifts, is devaluing, as well as deficit- not capability - based.



**Perpetual Child:** Seeing a person as a "disabled child" to care for rather than as an expert partner. Talking to the job coach or personal assistant, rather than to the person.

**Not Paying for Expert Advice:** Expecting people to volunteer rather than to be paid. Taking for granted that people will do everything for free.



**No Ideas Wanted:** Expecting people to say "yes", even if they don't agree. Not inviting people to speak their truth.

## Partnership Benefits

Check out some of the many benefits of partnering with people with cognitive disabilities (diverse abilities):



- **Higher Quality:** You can increase your quality through getting feedback about what works and what doesn't work from some of your main customers: people with diverse abilities.
- **Actions Match Words:** When people with diverse abilities are included in everything that involves them, this is a powerful statement to all the people you serve that your actions are committed to "getting it right" and moving past tokenism.
- **Credibility:** Other people with diverse abilities respect that self-advocates know what they are talking about.
- **Life Expertise:** People with diverse abilities have very valuable expertise gained from their own life experiences.
- **Fulfill Important Roles:** Self-Advocates have many useful skills that can meet needed Advisory Board roles.
- **Find Employees:** People with diverse abilities are a great source of potential employees that can help cover gaps such as those created as the labor pool becomes older.
- **Meet Organization Vision:** People with diverse abilities can help meet an organization's goal to have diverse Advisory Board members and employees that match the community served.

## Best Ideas: Create the Vision



**Create the Vision:** Invite people with diverse abilities to help create the vision. *Example:* In 2001, the CDD created a 2001-2005 vision, mission, values and strategic plan in partnership with family and people with diverse abilities from the CDD CAB. One strategic direction created to reach the vision was "Partnering with people with disabilities and their families."

**Implement the Vision:** Ask partners for ideas about how to make the vision real. *Example:* The CDD created a Partnership Task Force to guide its partnership related strategic direction implementation. All but two members of the task force are either family members and/or people with multiple significant disabilities, including people who communicate with communication devices.

**Analyze Current Partnership:** Take a look at what people with diverse abilities are doing already within your organization. *Example:* The CDD analyzed roles currently played by self-advocates and family members within the organization before planning for the future.

**Identify Needs:** Look at what people with diverse abilities can do and offer in the future related to the vision. *Example:* In strategic planning, CAB representatives helped the CDD design a process for identifying CAB member interests related to implementing the vision.

**Find the Money:** Work together to figure out what money is needed and where it can be found to support efforts by people with diverse abilities. *Example:* The CDD looked at what funding sources supported current self-advocate involvement so that other projects could tap into these resources. CAB members also shared funding ideas.

**Honor Hearts' Desires:** Find out what people with diverse abilities can and want to do. *Example:* The CDD oriented Advisory Board members to the CDD Strategic Directions in a manner that each could understand. Then, CAB members chose the strategic direction(s) that interested them and chose how they would like to participate.



## Identify Constituencies



**Recruit for Diverse Constituencies:** As part of your strategic planning, identify the constituencies with which you wish to partner. Then, recruit members who are able to represent the interests of and communicate information to each constituency. Here are some typical constituencies: self-advocate, family, tribal, age group, geographic region, and organizations. Where possible, you can recruit self-advocates and family members to represent required organizations such as Protection and Advocacy. *Example:* See "Tools For Success: #1" for an example of an Advisory Committee constituency recruiting grid that the CDD created.

## Define Roles and Ask for Commitment

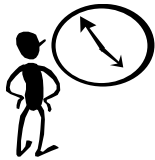
**Create Position Descriptions:** Create a position description that clearly and simply describes what the person will do. *Example:* CDD created a one-page outline that included "The Purpose of the Consumer Advisory Board" and "What CAB Members Do" (See "Tools for Success: #2"). Note that the position description includes how CAB members will relate to their constituencies, using simple words:

- "Represent a group of people who have the same values and interests as each member.
- Talk with CAB about the needs and interests of that group of people.
- Talk with that group of people about CDD information the member thinks they would like to know."



**Ask for a Signed Commitment:** Ask people to show their commitment to being part of the group by signing their position description. This also an opportunity to be sure that each person understands every part of what they are agreeing to do before signing. *Example:* The CDD CAB position description includes a place for each CAB members to sign that "I am ready and willing to do these things" (See "Tools for Success: #2").

## Support to Success: Take Time/Plan Time



**Slow Down and Take Time:** Matching rhythm and pacing of the meeting facilitation to individual needs is an important key to full membership by people with cognitive challenges. Facilitate interactions and meetings so that everyone has time to process what is happening as well as the time to respond.

*Example:* Several members of the CDD Partnership Taskforce usually do not rely solely on verbal speech. One prefers to supplement speech by typing messages on a computer. Another prefers to spell out words using a letter chart or to type messages on the computer. We facilitate the meeting to include these members by asking direct questions and welcoming comments. We slow the meeting down to wait for the response to be spelled out and then read by another committee member or a personal assistant. As another example, in CDD CAB meetings, facilitators may pause longer than usual to wait for a reply from the group. A person with diverse abilities might be asked by name if (s)he has a comment to be sure enough time is given for a response.



### **Forecast What Will Happen and What Each Person Will Do:**

Partnership interactions and meetings can be forecasted, just like the weather. In a very concrete manner, let people know what is going to happen and what (s)he will do. Offer opportunities to ask questions by asking the open-ended question, "What questions do you have?" during your explanation of what will happen. *Example:* "Tools for Success: #3" shares a CDD CAB Agenda where the standing second agenda item is "What will Happen at This Meeting". Each item has an explanation of what CAB members will do during that agenda item.

## Support to Success: Take Time/Plan Time *continued*



### **Make It Clear When Breaks and “The End” Will Happen:**

Sometimes people with diverse abilities, particularly those who do not tell time using watches, find it difficult to know when meetings will break or end. It can be frustrating and confusing to just float with no idea of when closure will happen. Build agendas that include concrete cues for when breaks and the ending will occur. *Example:* In “Tools for Success: #3” the break is tied to picture taking for the Web and the end is tied to getting feedback about the meeting. When covering Item 2 of the agenda, forecasting what will happen, when, the facilitator mentions those concrete activities. Then, when break time arrives, the facilitator references those concrete activities and lists other options like visiting with other CAB members, eating cookies, and visiting the bathroom.



**Debrief After the Interaction:** At the end of each interaction or meeting, review very specifically people with diverse abilities and family members want to keep doing and what needs to change. It is important to debrief immediately, while the memories are fresh. Be sure to implement those suggestions in the next meeting. At the end of the next meeting, review those suggestions and see if you “got it right”. *Example:* In “Tools for Success: #3”, agenda item 7 is a permanent topic called, “Your Feedback”. During that time, the facilitator asks CAB members what specifically they would like to keep doing in their meeting and what they would like to change. Examples of concrete suggestions we’ve received include: “Use bigger letters”, “Not so many big words”, “What do those letters mean”, “I was lost with the numbers”, “Give us homework”, or “Less paper, more talking”.

## Support to Success: Take Time/Plan Time *continued*



**Find Times and Places to Meet Together That Fit Everyone' s Needs.** Meeting in a wheel-chair accessible restaurant over the lunch hour might fit a person's schedule and comfort level for giving input into a work task better than an 8 am to 5 pm timeframe in an office. *Example:* The CDD Partnership Taskforce changed its meeting time to fit the bus schedule of a self-advocate who travels on a bus that runs at one-hour intervals.

## Support to Success: Learn the ABC's

**Here's the ABC's:**

**A** No "Alphabet Soup". People get lost quickly if you use acronym short cuts. If you must use a familiar letter abbreviation, take time each time there is a new person at the meeting, to ask if everyone understands what the letters mean. Then, post the letters and what they mean in large enough font so they can be seen during each meeting. *Example:* Here is an example of a sentence that could easily be uttered in New Mexico: "The CDD CAB works closely with DDPC, LTSD, CMS, P&A, PRO, DVR, SDE, DOH, DOL, TEASC, and other UCEs to assure maximum QA for people with DD, including meeting JACHO and HIPPA regulations." The translation of all these letters and the words they represent takes longer, but ensures that all the constituency representatives know what you are talking about and can effectively offer their ideas and expertise.

## Learn the ABC's *continued*

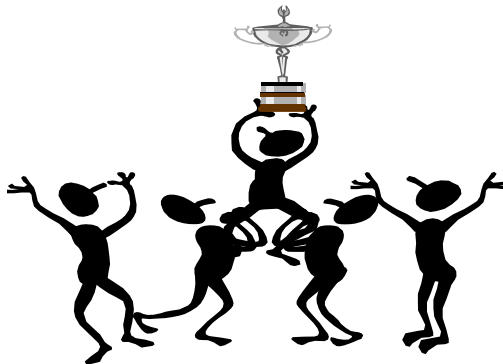
**B** Better yet, give up jargon. As a self-advocate Jon Peterson says, "Use plain English, not your native tongue, 'jargoneze'". *Example:* Speaking in specialized professional language about important topics can involve using terms like this: "Assessing possible neurodevelopmental disorders..." or "IDEA requires Transition Planning beginning at age 14 years..." It takes some thought and preparation before meeting to translate specialized professional terms into more understandable, everyday language.

**C** Cut down on big words. Even the name of a project may be difficult for people with diverse abilities and family members to understand. Come prepared with very simple and concrete explanations for any big words you must use. Include those explanations in both the handouts, PowerPoint presentations, and when you are talking. Remember to stop and ask if people understand.

**D** Do make sure that the letters and words are **big** enough for members, including those members with aging eyesight, to read on all visual aids. Make liberal use of clipart and pictures to help non-readers follow what is happening. Also, translate handouts into Braille or send them to members before the meeting electronically so people can use screen readers or other devices to review them, as needed.

**E** Educate yourself about how each member likes to learn and to communicate so you can match individual needs. *Example:* See "Tools for Success: #4, How to Wrestle a Toothless Alligator" for an example of an exercise we created to determine learning preferences. As another example, we have asked self-advocates and personal assistants to explain communication preferences and systems so that we can be sure we are honoring and understanding each person's communications.

## Support to Success: Mutual Mentorship



**Practice With and Coach Each Other:** Practice for events such as co-facilitation and give each other tips on how to improve performance. *Example:* A self-advocate CAB member co-facilitates presentations about this model. CDD staff members offer coaching about presentation techniques. The self-advocate gives advice such as: suggestions for simple, catchy wording that other self-advocates can easily understand, concepts to include and other valuable ideas. We coach each other to keep the presentation flowing smoothly.

**Ask the Person How and If S(He) Wants Help:** Do not assume that a person with diverse abilities wants your help. Ask first and give choices. This shifts the relationship to an equal partnership. *Example:* Ask "(Non-reader's name) would you like for me to read this to you? Or would you like to listen to it on tape?"

**Offer Mentorship:** Offer mentors to new members and others who want support during a meeting. *Example:* Experienced CAB members, including those with cognitive disabilities volunteered to be "CAB Drivers" paired with new members to offer mentorship. Also, we arrange seating so that natural mentorship occurs.

**Give the Information Needed Ahead of Time:** Make sure that people receive information ahead of time in a manner that matches their communication and learning preferences. Be careful not to overwhelm them with too much information. *Example:* CDD sends simply worded emails to keep CAB members informed.

## Support to Success: Pay People for Their Time



**Pay Stipends for Time and Travel:** Paying money for a person's time and travel expenses sends a clear message that you consider his or her time and expertise valuable. *Example:* At one point, we looked around the room and saw that everyone at the meeting except self-advocates and non-professional family members were paid for their time to be at the meeting. At that point, the CDD put into practice giving stipends for self-advocate and family member time and travel expenses to attend CAB meetings.

## Create Tools to Support Meeting Facilitation

Tools, such as agenda templates, help assure that innovative strategies for effective partnerships are implemented, regardless of who plans or facilitates the meeting. Those tools must be updated as new strategies emerge. *Example:* See "Tools For Success: #6 Meeting Planning Checklist" for a tool CDD created to guide CAB meeting planners. This checklist itemizes how a meeting planner can assure facilitation continuity in strategies such as supporting learning style preferences.

## **Seek Continuous Feedback**

Our efforts are strengthened through continuous feedback which can take many forms. *Example:* Under "Support to Success: Take Time/Plan Time", we described how the CDD invites feedback at each CAB meeting and then incorporates those suggestions into the next meeting. Feedback can also be invited through formal evaluation or be in an informal, individualized basis. For example, one day a member of the Partnership Taskforce who always has a personal assistant, was dropped off for the meeting alone. Despite many efforts by the facilitator, the person, atypically, dozed off and was unresponsive. With the assistance of the personal assistant who showed up after the meeting to assist the person in leaving, the facilitator talked in some depth with the person about what went wrong at that meeting. It turned out that the person had not been positioned correctly in the wheelchair and, in the slumped position, dozed off. Also, a new computer was covering the letters the person uses to spell out words and the person was not completely oriented to the new computer. Knowing this, the facilitator requested that a knowledgeable personal assistant assist the person at future meetings and this situation has not recurred.

## **Network Nationally**

The Acknowledgements section details how national networking, as well as generous information sharing and mentoring by other UCEs strengthened CDD's growth in forming true partnerships with people with disabilities. The CDD established relationships with other UCEs through annual meetings, co-presenting, web, email and telephone contacts.



## Know You're Never "There"

We have realized that it is important to know you are never really "there" with moving from tokenism to true partnership with people with diverse abilities. As we move through time, our understanding and strategies grow with experience as we implement the suggestions that people with diverse abilities and family members make to us. Complacency is a tempting major error. People with diverse abilities have much to teach us about the leadership and other expert roles they can play. The enriching impact of this expertise cannot be measured.



## Tools For Success: #1

### Example of an Advisory Committee Constituency Recruiting Grid

| <b>General<br/>Constituency<br/>Category</b>             | <b>CAB Member Name/<br/>Contact Information</b> | <b>Specific<br/>Constituency<br/>Information -</b><br>Include:<br>Name of Constituency Group<br>Tribe (if applicable)<br>Region<br>Age Group Represented |
|--|---|--|
| 1. People with<br>Developmental<br>Disabilities          |   |  |
| 2. Family<br>Members                                     |   |  |
| 3. Protection and<br>Advocacy*                           |   |  |
| 4. Developmental<br>Disabilities<br>Planning<br>Council* |   |  |
| 5. Self-<br>Advocacy<br>Organization                     |   |  |
| 6. Parent<br>Training<br>Center                          |   |  |
| 7. Assistive<br>Technology<br>Act*                       |   |  |
| 8. Relevant<br>State<br>Agencies*<br>(List):             |   |  |

**Tools For Success: #1 *continued***  
**Example of an Advisory Committee Constituency Recruiting Grid**

| <b>General<br/>Constituency<br/>Category</b>  | <b>CAB Member Name/<br/>Contact Information</b> | <b>Specific<br/>Constituency<br/>Information -</b><br>Include:<br>Name of Constituency Group<br>Tribe (if applicable)<br>Region |
|---|---|---|
| <b>9. Other<br/>Community<br/>Groups<br/>Concerned<br/>with the<br/>Welfare of<br/>People with<br/>DD and their<br/>Families*<br/>(List):</b> |   |   |

**Note:** Request Self-Advocate/Family Member representatives from these organizations as possible.

## **Tools For Success: #2**

**Example of an Advisory Committee Position and Commitment Statement  
Center for Development and Disability**

### **Consumer Advisory Board Member**

#### **The Purpose of the Consumer Advisory Board**

The Consumer Advisory Board (CAB) guides and advises the Center for Development and Disability (CDD). The CAB helps the CDD create and move toward its vision. CAB members help the CDD look at progress toward making that vision come true. CAB members give their ideas for how the CDD can help people with disabilities and their families have the lives they want.

#### **What CAB Members Do**

1. Learn all about the CDD and CAB.
2. Tell the CDD about their interests, gifts and talents.
3. Represent a group of people who have the same values and interests as each member.
4. Talk with CAB about the needs and interests of that group of people.
5. Talk with that group of people about CDD information the member thinks they would like to know.
6. Attend two CDD Consumer Advisory Board meetings each year held in Albuquerque.
7. Be part of any workgroups the member would like to join.
8. Share life experiences and information that will help the CDD.

**I am ready and willing to do these things:**

**Signed:** \_\_\_\_\_

## **Tools For Success: #3**

Example of a CAB Agenda Used to Explain What Will Happen,  
When and What CAB Members are Expected to Do

*Note:* Item #2 is a Standing Topic at CDD CAB Meetings

### **Center for Development and Disability Consumer Advisory Board Meeting Agenda 1:00-4:45, June 5, 2003**



#### **Topic:**

##### **1. Welcome**

##### **2. What Will Happen at This Meeting**

You Can Ask Any Questions You Have About What Will  
Happen at This Meeting

##### **3. What's Something Important That Has Happened in Your Life Since We Last Met?**

You Will Share Something Important That Has Happened in  
Your Life Since We Last Met

##### **4. How CDD's Neurodevelopmental Division is Including People with Disabilities and Families**

You Will Listen, Ask Questions, and Offer Your Ideas

#### **BREAK**

You Can Have Your Website Photo Made  
(If You Do Not Have One)

##### **5. How to Build and Strengthen Community for Better Lives and Emergency Preparedness**

What Do You Think?

##### **6. The New CAB Website**

What Do You Think?

##### **7. Today's Meeting and Thanks for Coming!**

Your Feedback

## Tools For Success: #4

### How to Wrestle a Toothless Alligator

1. Give each person a large name tent with his or her name on it.
2. Hold up a picture of a toothless alligator.
3. Using a picture with the symbols in parentheses by each statement below, ask each member to choose what would be their favorite way(s) to learn to wrestle a harmless toothless alligator:
  - Watch someone else wrestle the alligator. (Observation: Magnifying Glass)
  - Read about how to wrestle the alligator. (Visual: Eyes)
  - Just do it. (Hands On: Hand)
  - Listen to someone tell how to wrestle the alligator. (Hearing: Ear)
4. Give each person the symbol(s) related to their preferences and ask him/her to glue the symbol(s) onto their name tent on the side that has the person's name.
5. Record each person's preferences and orient facilitators to them so they can be sure their presentation matches preferences.
6. Use these name tents for each meeting as a reminder to facilitators and participants of learning preferences which increases understanding and meeting participation.

## Tools For Success: #5

### Center for Development and Disability Consumer Advisory Board 6/27/02 Orientation Training Working Agenda

| <u>When:</u> | <u>What:</u>   | <u>Visual Aids:</u>   |
|--------------|--|---|
| 12:00        | Welcome, lunch provided  |   |
| 12:15        | Introductions<br>Who You Represent<br>Agenda<br>What is Your Style?<br><i>How to Wrestle a Toothless Alligator</i> | Name Tents<br>Flipchart (FC)<br>Cutouts of:<br>Ears, Eyes, Hands,<br>Magnifying Glass<br>Exercise on FC |
|              | CAB Purpose<br>Your Role   | FC with Illustration<br>Commitment Letter   |
| 12:40        | Commitment to the CDD<br>Mission   | FC  |
|              | Which CDD Values Make Your<br>Heart Bloom?   | Each Value on FC<br>Keyed to<br>Artificial Flowers  |
|              | Which Strategic Directions<br>Match Your Interests<br>+ Gifts  | Butcher Paper<br>Illustration   |
| 1:15         | How can we support each<br>other in CAB meetings?<br><i>Role-play</i>  | Index Cards<br>With Scenarios<br>to Practice<br>Flags   |
| 1:50         | Sneak Preview: Today's<br>Meeting  | FC Agenda<br>Graphic  |
| 1:55         | Sign Commitment Statement<br>Sign Up for "CAB Drivers"<br>Announce CDD Tours/Meeting                               | Commitment<br>Statement   |
| 2:00         | After Meeting CDD Tours  |   |

**Tools For Success: #6**  
**Meeting Planning Checklist**

Name of Meeting: \_\_\_\_\_ Meeting Date: \_\_\_\_\_

Name of Meeting Coordinator: \_\_\_\_\_

Back-up Meeting Coordinator: \_\_\_\_\_

A. TWO MONTHS before meeting: (Date: \_\_\_\_\_):

**Initial When Completed:**

1. Possible dates and times identified (list dates and times):

2. Tentative room reservations made (list rooms tentatively reserved):

3. Input sought from Director and Program Managers and review input from feedback from CAB members from Minutes of last CAB meeting about (describe input and who gave it):

\_\_\_\_\_ Topic/Outcome/Evaluation of Outcomes:

\_\_\_\_\_ Date/time:

\_\_\_\_\_ Possible presenters:

\_\_\_\_\_ Who should be invited:

4. Topic and desired meeting outcomes decided.

5. In very simple words, list topics/outcomes/what CAB members are expected to do for each item - remember #2 agenda item is always "What Will Happen at This Meeting" and the last item is always "Today's Meeting - Thanks for Coming: Your Feedback" how outcomes will be evaluated.



**Tools For Success: #6**  
**Meeting Planning Checklist *continued***

***B. ONE AND A HALF MONTHS before meeting: (Date: \_\_\_\_\_):***

**Initial When Completed:**

- 6. Presenters confirmed (describe who they are):
- 7. Room reservation finalized (describe what room)
- 8. Invitation drafted with request for any accommodations/food preferences needed (attach)
- 9. Any equipment needed for presenters reserved (list):
- 10. Food arrangements made (describe):
- 11. Notify CDD Program Managers about meeting (attach e-mail)

***C. ONE MONTH before meeting: (Date: \_\_\_\_\_):***

**Initial When Completed:**

- 12. Invitations finalized and mailed as well as Web site announcement (give date mailed):
- 13. Presenters re-contacted and notified regarding how many handouts are needed as well as accommodations needed and ask them about desired room arrangement (describe):
- 14. Accommodations arranged (describe):
- 15. Double-Check Room Reservation (describe)

**Tools For Success: #6**  
**Meeting Planning Checklist *continued***

**D. TWO WEEKS before meeting: (Date: \_\_\_\_\_):**

**Initial When Completed:**

- 16. Check-in with presenters and address any needs (describe):
- 17. E-mail reminder and post flyers reminding CDD Program Managers of meeting (attach):
- 18. Call/fax reminder to invited guests (describe/attach and who contacted)
- 19. Recheck reserved equipment and assure it's still available and in working order (describe):
- 20. Recheck food arrangements (describe):
- 21. Recheck accommodations arrangements (describe):
- 22. Prepare sign-in sheet (attach)
- 23. Arrange with receptionist how guests will be greeted and directed to meeting (describe):
  
- 24. Orient meeting facilitator(s) and any invited presenters to CAB member learning preferences (Name Tents from "How to Wrestle a Toothless Alligator") and meeting facilitator techniques to support CAB members to success (for example: cut down on big words and acronyms, give more time):

**Tools For Success: #6**  
**Meeting Planning Checklist *continued***

***E. ON THE MEETING DAY*** (Date: \_\_\_\_\_):

**Initial When Completed:**

- 25. Arrive at least an hour early (date)
- 26. Set up room (be sure learning preferences name tents are in place - seat CAB members to encourage mentoring by experienced CAB members)
- 27. Set up food
- 28. Set up sign-in sheet
- 29. Greet guests and presenters
- 30. Take minutes
- 31. Collect Feedback from CAB members as last agenda item
- 32. Debrief with presenters and CDD staff about meeting after the meeting (describe):
- 33. Break-down room
- 34. Review CAB members' feedback about what they would like to keep doing and what they would like to change:
  - Facilitators debrief about the meeting: what went well?
  - What would you do differently next time?

**Tools For Success: #6**  
**Meeting Planning Checklist *continued***

***F. WITHIN TWO WEEKS of Meeting (Date: \_\_\_\_\_):***

**Initial When Completed:**

35. Send e-mail thanks to presenters (attach)

36. Complete and mail out minutes - also post on Web site  
(attach copy)

**ADDITIONAL NOTES:**

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