

Partners in Policymaking® Coordinator's Handbook



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In 1987, the Minnesota Governor's Council on Developmental Disabilities created Partners in Policymaking®. Since then, Partners programs have been implemented and funded throughout the U. S. and internationally.

More than 21,000 Partners graduates in the United States and 2,000 Partners graduates internationally are part of a growing national and international network of community leaders serving on policymaking committees, commissions, and boards at local, state, and national levels.

Partners is an innovative, competency-based leadership training program for adults with disabilities and parents of young children with developmental disabilities. The purpose of the program is two fold:

- Teach best practices, and
- Teach the competencies of influencing public officials.

Overview of the Handbook

This is the seventh edition of the Coordinator's Handbook since 1990. The purpose of the Handbook is to help Coordinators when they are starting new programs and to maintain the quality of existing programs.

To accomplish these ends, the Handbook is organized into four sections:

Introduction – an overview of the Handbook, an overview of why Partners in Policymaking® was created, and an introduction to the concepts of partnerships with policymakers, best practices, and systems change.

Quality Standards – the principles and values which underpin the Partners program, the standards for a model replication program, the competencies Partners participants will acquire, Coordinator duties, criteria and rationale for selecting participants, and the use of national speakers.

The Sessions – an outline of the curriculum, design and process considerations for each session, graduation, and follow-up.

Guidelines and Helpful Ideas – guidelines, hints and approaches for skill-building activities, recruitment and selection, creating a welcoming program, quality improvement, funder-program relations, and budgets.

Why Partners in Policymaking Was Created

The goal of Partners in Policymaking is to educate participants to be active partners with those who make policy. They will become partners in policymaking. The idea is to develop partnerships that are based on positive relationships. In today's political climate of radical change, Partners graduates must work harder than ever to prevent the loss of basic rights for people with disabilities. Partners graduates can change the future by influencing public policy today.

The origins of Partners program are rooted in the many and complex problems faced by people with disabilities and their families. The idea for Partners emerged in 1986. At that time, people with disabilities and families:

- Had no centralized, organized, systemic education and training to provide them with state-of-the-art experiences and information.

- Needed systemic training to develop competencies involved in effectively influencing public officials to make grassroots advocacy really work.
- Had few training programs to prepare them for positions of leadership in local, state, or national organizations.
- Needed a shared vision for self-advocacy – motivated, well-informed, active, energetic volunteers and self-advocates who share a vision about the year 2020 and beyond.
- Had no mechanism for state and national leaders in the disabilities field to meet and discuss issues with people with disabilities who are traditionally unserved and underserved.
- Had no systemic educational program available that was designed to improve competencies and increase their empowerment.
- We're at risk of losing an aging leadership and weren't grooming young leaders.
- Didn't have opportunities to connect with others. Few parents could meet adults with disabilities who could help them dream for their children. Few adults with disabilities knew parents of children with disabilities who could give them a perspective on the experiences of their parents.

In response, Partners in Policymaking was developed to:

- Train participants in **best practices** over a wide range of issues, and
- Help them acquire the skills necessary to **change systems**.

Partners graduates create a **shared vision**, enlarging the power base of disability rights advocates.

Partners participants become competent to change their own lives, and then to work for changes that will affect others with disabilities at local, state, and national levels. Partners graduates are expected to be **agents of long-term change**. They learn there are no “quick fixes.” They are trained to achieve long-term successes.

Partners has allowed me to dream again...to dream about my son the way all parents dream about their children. Partners has showed me how I can change and must be a part of change in our society that includes all people.

a parent from Illinois





Partnerships with Policymakers

Policymakers are the people in government who are elected or appointed to make decisions about rules and regulations, who control the money, and who legislate. They are politicians and civil servants. There are thousands of elected and appointed men and women at the Federal level, and thousands more at the state, county, and local levels of government. Policymakers and policymaking bodies include school principals, school boards, city councils, mayors, county and state officials, state senators and representatives, state agency boards, and federal legislators and agencies.

As the number of Partners graduates increases, a network of highly-motivated, powerful individuals are positively influencing the thousands of policymakers who shape disability issues at all levels of government.

Graduates of quality Partners programs are well-equipped with the necessary skills and knowledge to become partners with anyone in a position to make policy at the local, state, and federal levels. Some Partners graduates have *become* elected and appointed public officials.

A Fundamental Focus on State-of-the-Art Best Practices

Question: What is meant by best practice and state-of-the-art in terms of disability issues?

Answer: Both of these terms refer to the most up-to-date and best ways of doing things, from a national perspective.

Best practices and state-of-the-art are always evolving! What is best practice today may not be best practice in six months or a year.

State-of-the-art information gives Partners participants the big picture, allows them to dream big, and gives them the strategies to turn their dreams into reality. The collective impact of Partners participants dreaming the big dream and working to achieve it will affect people far beyond the graduates and their families – the face of disability issues will change.

This program does not exist to teach participants how to get access to services that are already available in their state. This information might come out during the training sessions, but it is not, and should not be the focus of the entire program. Most Partners participants, through their life experiences, already know about what is and what's not available, and how to get it. *It is a waste of program time, money and energy for Partners in Policymaking to offer an introductory course on state services.*

The design of Partners is based on national speakers who keep their presentations up-to-date so they contain the most current information of best practices/state-of-the-art.

Partners is about today's best practices. It is very important that every Partners program be up to date. Look at how quickly best practices changed between the mid-1980s and the 21st century!

Life Area	2012	1990	1985
Education	Full inclusion for every child with a disability; post-secondary education on inclusive college/ university campuses.	Inclusion for children with disabilities.	Integration for some children, for part of the day.
Employment	People with disabilities are hired directly by employers. They receive competitive wages and have career paths.	Supported work with agency job coaches.	Demonstration projects in a few states: experimentation with entry level positions.
Living	A home of your own with the supports of your choice.	Some supported living.	Small group homes.
Assistive Technology	Anything that enables a person with a disability to have a better, more self-reliant life, from high-tech to no-tech, voice activated technology, Web access, digitized imagery, e-mail.	Computers, wheelchairs, adaptive daily living equipment.	Wheelchairs and communication devices.



Partners in Policymaking is about systems change. Systems change in terms of disability issues means:

An organized effort to improve the way things are currently done by educating and influencing policymakers to make changes that are positive and more responsive to people with disabilities and their families.

Systems Change

Systems change is fundamentally about working toward and achieving a new vision. Historically, the entrenched systems and policies in our society (from local to federal) have not served people with disabilities and families well.

Appointed and elected officials have traditionally made policy decisions about people with disabilities and their families. Partners in Policymaking is based on the idea that policy decisions should be made instead by people with disabilities and families in partnership with each other and elected and appointed officials.

The commitment of Partners in Policymaking is to enable people with disabilities and families to help make far-reaching changes in the systems that are supposed to serve them. By influencing policymakers at all levels, systems can become more responsive, customer-friendly, and consumer-driven.

Personal change in participants is a by-product of the Partners program. If Partners graduates are competent in personal change but do not have systems change skills, the program is not investing its funds wisely. The funder is expecting a cadre of disability advocates who are able to assist in the critical efforts facing the disability community today. If a Partners program is not producing graduates competent in systems change, the future of that program is in jeopardy. Funders will be unwilling to continue to invest money in a program that does not produce positive systemic results.

Parents of children with disabilities and adults with disabilities can receive training in advocacy and personal change from a variety of sources.

Partners in Policymaking is the only best practices training program that is teaching systems change.

Partners in Policymaking graduates who are competent in systems change are prepared to be the leaders of tomorrow.

Quality Standards

A variety of quality standards must be met for a program to (1) be an authorized and a legitimate Partners in Policymaking program and (2) achieve the outcomes described in this handbook. These standards include:

- A commitment to replicating the model described in this handbook
- Quality principles of process, approach, and outcomes
- Core values about people with disabilities
- The duties of coordinators
- National speakers
- Selection criteria
- Competencies of graduates.

The last section of this handbook contains a set of guidelines for *disciplined business conduct*, and a series of policy statements on sexual harassment, alcohol and other drug use, and workplace violence.

A Commitment to Replicating the Model

As a Partner's coordinator, you and/or your organization are responsible for replicating a program that has been proven effective. The model has worked in almost every state and internationally. It is also adaptable enough to be relevant to the situation in the location using it. The key to the model's success, however, is clear – **in order for Partners graduates to be successful, the model must be fully implemented.**

The Minnesota Governor's Council on Developmental Disabilities wants Partners to continue to be a success. In addition, it has a direct interest in that success. According to the Office of the Minnesota Attorney General, the Partners in Policymaking name and model is the intellectual property of the Minnesota Governor's Council on Developmental Disabilities and the State of Minnesota. To protect these proprietary privileges, the Council wants to make sure that a leadership training program that refers to itself as a Partners in Policymaking program or a Partners replication follows the same principles outlined in this handbook.



Replication – to take a successful, complete model and follow the same processes and ideas with funding and support from local groups and individuals.

Information about copyright, trademark and the Program License Agreement can be found at www.partnersinpolicymaking.com/classroomcoordinators.html.



Here are some key points about replicating the Partners program:

- ▶ The **success of the model program** has been documented for more than two decades. The quality principles and curriculum have been formulated from a variety of disciplines. The results have been tested and successful outcomes documented. *Changes to the Partners model program should not be made unless it can be demonstrated that those changes improve the program.*
- ▶ From year to year and from state to state, Partners graduates should be on the same “playing field,” to ensure they can assist each other when advocating for disability rights at all levels of government. Similarly, it is important that Partners graduates achieve the same levels of competency across geographic lines. Some Partners graduates are disappointed that they weren’t trained in certain competencies that other Partners graduates acquired.
- ▶ Using this handbook, replicating the model program, and incorporating the online courses will enable Coordinators and funders to maintain the highest quality standards. To do this, you must have a frame of reference. The replication model provides that and includes a dedication to improvement.
- ▶ By following the replication model, Coordinators, and possibly the funders, are freed from the overwhelming task of trying to “reinvent the wheel.” The replication model is proven. Following the “recipe” allows the Coordinator to customize the program for the state, while leaving the proven curriculum intact.

Quality Principles: Process, Approach and Outcomes

Partners in Policymaking is based on a core set of principles about process, approach, and outcomes:

- **Experiential Learning:** Partners participants learn by doing. They prepare and deliver testimony. They practice speaking to public officials. A variety of different learning methods ensure participants acquire the competencies.
- **Diversity:** Partners groups are diverse in experiences, disability types, geographic location, gender, racial and ethnic backgrounds, income levels and education levels. Partners participants learn as much from the experiences of their peers as from the curriculum and presenters.

- **National Speakers:** Partners participants obtain training from speakers who provide a national perspective that is up-to-date on best practices and state-of-the-art.
- **Best Practices:** Partners participants learn about what's possible, not about what already is! They break out of the status quo and ask, "What if..."
- **Leadership:** Partners participants acquire knowledge for change, not just for knowledge's sake. They use the things they learn to take action for social change. They provide leadership in their communities. Partners is not about getting the most services for participants and their families.
- **Length of Time:** Funders make a commitment to Partners programs for a full 8 sessions of training. Partners participants receive 128 hours of instruction over the course of a program year.
- **Sufficient Funding:** The funding agency commits to provide a level of funding that will ensure a quality program, based on the standards and recommendations in this handbook. Funders commit to quality replications that pay for all the program related expenses. This money supports the other quality principles
- **Evaluation:** The compilation of initial, six-month, and long-term surveys reveal the effectiveness of the program, and may be a critical factor in a funder's decision to continue funding future Partners programs. Partners participants and speakers evaluate their experiences with the program. Partners participants are surveyed before they begin the program, and at six months following graduation. Long-term surveys are done for several years. These results are tracked and monitored for long-term trends.
- **Not an Organization:** Partners is a leadership training program, not an organization. The real work of graduates is in community, state and national organizations. The program links them with networks and helps them acquire the competencies needed to succeed.
- **Outcomes:** The program's ultimate outcomes are increased independence, productivity, integration, inclusion and self-determination for all Partners participants and their family members.





Core Values about People with Disabilities

A quality Partners in Policymaking program is built on critical values relating to the inherent worth of people with disabilities. These values must be the underlying thread woven throughout every aspect of the training program. Partners is all about how to achieve a vision which respects these values.

Value #1: People with disabilities are **people first**. They are not “the handicapped” or “the disabled.” Using People First Language is a must – no labels!

Value #2: People with disabilities need **real friendships**, not just relationships with paid staff.

Value #3: People with disabilities are entitled to the full meaning of the right to free speech. The ability to **communicate**, in whatever form, must be available to every person with a disability.

Value #4: People with disabilities must be able to enjoy full **mobility and accessibility** that allows active participation in community life.

Value #5: People with disabilities must be assured **continuity** in their lives through families and neighborhood connections.

Value #6: People with disabilities must be treated with **respect and dignity**.

Value #7: People with disabilities must have the **freedom to choose** how they want to live their lives and receive the support they need.

Value #8: People with disabilities must be able to **exercise choice and control** in all areas of their lives.

Value #9: People with disabilities must be able to live in **homes** of their choice and choose the supports they need.

Value #10: People with disabilities must be able to enjoy the benefits of true **productivity** through employment and/or **contributions** as members of their communities.

These values were conceived in 1987, and continue to reflect best practices.

Coordinator's Essential Duties

The essential duties of the Coordinator of a Partners in Policymaking program are in eight areas:

- Recruitment and selection of Partners participants
- Program design
- Session processes
- Speaker arrangements
- Accessibility
- Partners support
- Quality improvement
- Relationship with funders.

These duties address the needs facing Partners Coordinators and Partners participants. The needs may change from year to year, but there is one constant:

If the Coordinator, presenters, and participants-individually and as a whole-cannot model and create an inclusive, welcoming environment during a Partners weekend, then Partners participants cannot be expected to achieve inclusive welcoming environments in their communities.

The following is a checklist of duties and responsibilities.

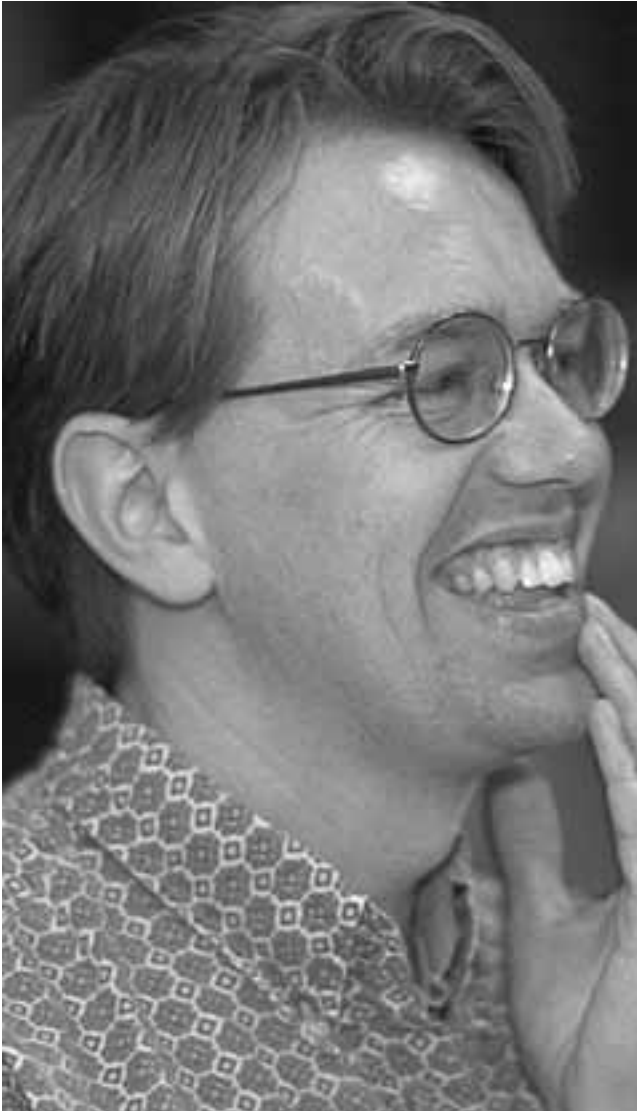
Recruitment and Selection of Partners participants

- A diverse group of qualified individuals has been selected (see Selection Criteria).
- Participants are ready and willing to learn a new way of thinking and will use this knowledge to achieve systems change at local, state and federal levels.

Program Design

- Partners sessions reflect the core values being taught from previous page.
- All sessions ensure that all Partners participants have the opportunity to learn that session's competencies. The critical factors include the selection of the speaker and his/her topic, hand-outs, activities, small group exercises, and homework.
- Every session has a combination of learning methods, including presentation, discussion, and exercises, to assure full participation by each and every person.





- The year's program is structured so that Partners participants learn competencies in a logical, sequential order. Each session adds to the completeness of the program and builds upon the previous session.
- Nationally-recognized speakers who are leaders in their field have been recruited to instruct Partners participants in best practices in disability issues.
- Speakers present philosophies of disability issues, concrete information, and specific strategies to create systems change.

Session Processes

- Meetings (presentations and breaks) are run on schedule.
- All Partners participants and speakers have a clear understanding of expectations.
- Each participant has an accurate agenda for each session at least two weeks in advance.
- Each agenda is specific about starting and ending times for each topic during the weekend, break and meal times, meeting room locations, and types of activities during each session (for instance, lecture, small group exercises).
- Supplies are ready for use during the session: flip charts to record small group work, odorless markers, 3-hole punch, masking tape, extra name tags, sharpened pencils, writing tablets, hand-outs of previous sessions, extra tapes when recording sessions, Internet access, back up computers, other personal devices, and any other materials necessary to ensure a smooth, worry-free session.
- The Coordinator actively observes every Partners session, remaining in the meeting room during the session, to assess the speakers' presentations, gauge Partners participants' involvement, and self-evaluate the success of that session. When feasible, notes are recorded on a laptop computer and debriefings are held.
- Hotel staff assure that all persons involved in Partners are treated with dignity and respect.
- The Coordinator is familiar with the meeting rooms, including the thermostat, lights, and microphones; and how to easily contact facility staff for assistance.
- The status of equipment (LCD/digital projector, laptops for speakers, secure uninterrupted access to Internet for laptop/DVD) is verified. Easy access to technical support is available.

- Presentations are loaded on speaker laptops in advance of the session. All equipment is tested, including DVDs for sound, if necessary, and closed captioning.
- Facility staff have contingency plans in place in case of any problems and/or mechanical failures.
- Microphones are used by everyone – staff, presenters, participants asking questions of the speaker (clip, lavalier, or headset may be better or easier for speakers, while hand-held microphones might work better for participants).
- All Partners participants, guests, and speakers can hear what's being said.
- Packets of information are prepared for each participant, for every session. The packets include the agenda, hand-outs from the speakers, biography of the speakers and their addresses (including e-mail addresses), other reading materials, homework assignments, evaluations, and reimbursement forms. For those with Internet access, place all forms online.
- Partners participants and speakers think about how the Internet plays a role in whatever topic is covered, whether the topic deals with a specific level of government or addresses a specific life area.
- The competencies of each session; and the values of independence and self-determination, productivity, integration and inclusion are reinforced.
- Teams of Partners can do onsite tasks, such as morning greeters, speaker assistants, collect evaluation forms, help with microphones, etc.
- Participants are reminded to turn off cell phones and all other personal devices.



Speaker Arrangements

- Each speaker has a clear understanding of what is expected from his/her presentation, and what competencies should be achieved by participants during the session.
- The speaker is informed of the unique and individual dynamics of the members of the Partners class so that the speaker is presenting information geared to the level of understanding of the class.
- Each speaker knows what adaptations are made available to participants who need adaptations to facilitate learning.
- Each speaker understands exactly when and where his/her presentation is scheduled. This information is conveyed in written personal communication



and by mailing him/her the session agenda well in advance of the scheduled presentation.

- Contracts with speakers clarify who is financially responsible for what expenses (for example: transportation, meals, incidentals).
- Every speaker is informed of the date his/her handouts are needed prior to the presentation. (This allows time for the Coordinator to make copies and include them in the monthly packets for participants.)
- Speakers' hotel accommodations and transportation from the airport to the hotel/ facility are arranged and/or provided, and clearly communicated.
- Speakers are provided with the name, address, telephone number and directions from the airport to the hotel/facility. Emergency phone numbers are available for the Coordinator and the speaker.
- Speakers receive the correct payment of expenses within a reasonable time frame after their presentations.
- Each speaker provides an up-to-date vita and contact information (including e-mail addresses) to the Coordinator who includes this information in participant packets.

Accessibility

- The hotel/facility site is personally visited prior to booking to verify accessibility in hotel guest rooms and bathrooms, elevators, meeting rooms, public restrooms, restaurants, bars, entrances and parking areas.
- Meeting rooms and dining areas are set up in a manner that allows complete wheelchair access throughout the room, including access to the tables in the front of the room, the podium, and meal service tables.
- The necessary adaptations to reading materials (including simplifying the materials, translation into other languages and Braille) are made to provide equal access to every part of the Partners program. Any information that is posted online must be accessible.
- All presenters are notified of necessary adaptations in advance to ensure that every participant receives the full benefits of and enjoys full participation in every session.
- Speakers are informed ahead of time regarding the use of interpreters and other types of accommodations. Speakers are asked to send their notes/ materials ahead of time to assist the interpreter(s) in providing the best possible service.

- If training sessions are videotaped/or audiotaped, speakers give prior permission to record presentations. (These recordings may be used by Partners participants who require review or repetition in order to learn and/or acquire the competencies.)
- If training sessions are recorded (audio and/or video), personnel are in place with the necessary equipment in order to successfully and unobtrusively record the sessions.
- Translators are provided to enable full participation of all.

Support to Partners Participants

- All Partners participants are encouraged to write thank you letters or send e-mail thank you messages to speakers and/or guests. (This is both an exercise in effective and timely communication and a means for Partners participants to express appreciation to the speakers/guests for their presentations.)
- There is open communication among Partners staff, funding organization staff, participants, speakers, and guests.
- Friendships and relationships between parents and self-advocates in the Partners class are encouraged, and facilitated when necessary. This will develop the camaraderie necessary for a successful long-term Partners network. Encourage both face-to-face, e-mail interactions, and Facebook groups.
- Expenses are reimbursed within a reasonable time after forms are submitted by Partners participants.
- E-mail addresses are included in the participant lists distributed to Partners participants. The use of this technology is encouraged and information on low/no cost local Internet providers (IP) is available upon request.
- Post-graduate support is provided for Partners graduates to ensure that they can and will continue the systems change advocacy learned during the training program.
- Answer specific questions and resolve individual issues with persons/organizations with expertise in the state where the Partners program is being carried out.

Quality Improvement

- All aspects of the Partners program are assessed regularly through self-evaluation, participants' evaluations, and outside evaluation.





- Improvements are made to ensure that the program reflects the highest quality standards.
- The Coordinator is committed to the idea of continuous improvement of the program. If the opportunity arises to make things run better, faster, or at less expense without jeopardizing the integrity of the program, it is taken.
- All evaluations are read and examined for actions that can be taken to improve the program.
- Improvements are tested and results measured.
- The Coordinator must resolve complaints to the satisfaction of the person who made the complaint.

Relationship with Funders

- Funding for Partners is sought from sources who support the vision of a Partners in Policymaking quality model, believe in the value of empowerment, and will nurture the efforts of the Partners staff and its participants.
- Careful attention is paid to the budget.
- There is close contact with funding sources to resolve any discrepancies or problems.
- Regular reports about the program are provided to the funding organization according to its specifications.

National Speakers

The quality of Partners depends on national speakers who:

- Are expert in the topic area, including an understanding of the connection between levels of government, systems change, and policy results;
- Have a broad perspective on best practices and disability issues;
- Know the best practices that are consistent with an empowering vision;
- Understand and are committed to the core values and principles of the Partners program;
- Understand what Partners in Policymaking is all about;
- Know how to communicate what they know through adult learning methods;
- Are motivated and enthusiastic themselves, and can inspire and energize participants.

In-state and local speakers can augment and complement sessions. The predominant message or messages of any session should be carried by a national speaker who is committed to state-of-the-art information.

- Speakers must understand new concepts and best practices in the field and be able to incorporate with a broad perspective and expertise on specific issues. Often, the federal/national government sets disability policy for the entire nation.
- Speakers must teach best practices and “what’s possible,” while local speakers must be able to go beyond the status quo. Partners participants already know disability policy in their community – they live with it day in and day out.
- Cross-fertilization of ideas can only occur when exchange happens across communities. Speaker selection is one way to bring information from other communities to Partners participants.
- Speakers who are not local can say things that local speakers cannot. Local speakers may feel the pressure of their occupations, positions, or political connections.
- Partners participants need opportunities for developing connections and mentorships with speakers if they are to be promoted to national boards and commissions.
- Partners graduates need to be on a level playing field with Partners graduates in other states or regions to be able to effectively network. Speaker selection brings the same level of information and skills to each Partners group.
- Speakers have the opportunity to get to know a small group of people, enriching the speaker’s work with the experiences of Partners participants.

Coordinators should select speakers so that a wide range of people speak to the Partners participants over the course of a year: people with disabilities, men and women, and people from diverse cultures and backgrounds.





Criteria for Selection of Partners Participants¹

A quality Partners program is committed to recruiting a diverse group of participants positioned to engage in systems change. The goal is not to simply develop the skills of each individual, but also to create a group of people who can support one another and bring a range of talents to bear in their state.

For these reasons, the following criteria should guide your participant selection:

Parents of Young Children Most Preferable

They are receptive to new approaches and best practices, in a position to make the greatest changes over the life span of their children, and not locked into the status quo.

Self-Advocates

Select those adults with disabilities who are ready and willing to take on the system and work and live in the community.

Not Involved in Advocacy Organizations – “New Blood”

Lots of folks are already active advocates. Invest your funding in those who are inexperienced!

Ethnic Minority Representation

The make-up of your class should reflect the make-up of the general population.

Male/Female Mix

Lots of moms apply. The program also needs dads. Ensure a good ratio of male to female within the self-advocate population, too.

Cross-Disability Representation

Ensure that the participants selected represent a wide range of disabilities.

Geographic Representation and Economic Diversity

Partners participants should represent all parts of your target area and economy.

Motivated for Systems Change vs. Personal Gain

Try to select applicants who want to go beyond their own personal issues.

1. A fuller discussion of the rationale for some of these criteria is in [Recruitment and Selection](#)

Alignment to Independence, Productivity, Self Determination, Integration and Inclusion (IPSII)

Choose participants who embrace the philosophy that people with disabilities belong in the community, not in segregated settings.

Enthusiasm for Learning

Partners needs participants who are eager to learn and are open to new ways of thinking! Again, “new blood” is important—participants who are not already stuck in the status quo.

Evidence of Commitment to Long-Term Advocacy Efforts

Systems change can be a long term process. Participants need to be tenacious and determined.

**Make sure these criteria are included in your application form.
Do not judge applicants on questions you haven’t asked.**

Competencies

Partners in Policymaking is not a “get-together.” It is a focused effort to develop knowledge, skills and abilities. You get funding and attract participants because you promise results. Quality Partners programs take seriously their commitment to make good on their promises and deliver results.

The results you promise are that, upon graduation, Partners participants will be able to:

- Describe the history of services for, and perceptions of, people with developmental disabilities.
- Describe significant contributions of the parents’ movement.
- Describe the history of the self-advocacy and independent living movements.
- Describe the benefits and values supporting inclusion and quality education, including post secondary education, for students with and without disabilities.
- Outline specific strategies to achieve inclusion and quality education.
- Demonstrate knowledge of the service coordination system and what services may be available.
- Describe the importance of self-directed planning for people with developmental disabilities.
- Understand the principles of choice and control of resources in self-directed planning.



- Understand the reasons for and the importance of proper positioning techniques for people with physical disabilities.
- Describe examples of state-of-the-art technologies that can benefit people with disabilities.
- Describe the importance of supported, competitive employment opportunities.
- Understand that a flexible, responsive system of supports for the families of children with disabilities is the cornerstone for a true system of community supports for people with developmental disabilities.
- Understand the need for all individuals to experience regular and ordinary changes in lifestyle across the lifespan.
- Know/understand the importance of home ownership/ control as one of the defining characteristics of adult life in our culture.
- Understand the basic principles and strategies being used to support people with developmental disabilities in their own homes across the lifespan.
- Create a vision for the year 2020 (and beyond) for people with disabilities.
- Understand how a bill becomes a law at the state and federal levels.
- Identify critical federal issues and the process by which participants can personally address their concerns.
- Demonstrate successful techniques for advocating for services to meet the needs of unserved and underserved individuals.
- Draft and deliver testimony for legislative hearings.
- Learn how to meet a public official and discuss issues.
- Identify strategies for beginning and sustaining grassroots organizing.
- Understand when and how to use the media to effectively promote participants' issues.
- Demonstrate proper procedures for conducting a meeting.
- Gain a basic understanding of parliamentary procedure and serving on boards.

The Partners Sessions & Beyond

Curriculum Topics

This section contains a description of the Partners curriculum topics and ideas for follow-up with graduates. Coordinators, participants, and presenters will greatly benefit from reviewing the relevant topic in *Curriculum Highlights* (<http://www.partnersinpolicymaking.com/curriculum.html>), the online courses, and the blended learning module prior to the training sessions.

For each topic, we outline:

- Purpose of the topic
- Competencies participants should achieve
- Considerations for presentation style and skill-building activities
- Homework options
- Key terms

At the end of the section are ideas for follow-up with Partners graduates.

Topic Order

The Partners curriculum topics are designed to be comprehensive and sequential:

- Comprehensive so Partners participants acquire the competencies;
- Sequential so the topics flow and build upon each other.

To that end, Coordinators should carefully consider the order of each topic.

There are eleven topic headings. The model requires eight sessions to cover these topics. Some of the topics are stand-alone – one topic will fill the entire weekend. Other topics are combined. The combination of topics should be logical and the topics should complement each other. The order presented on the next page is strongly recommended. Changes can be made to accommodate the legislative session.

Session Scheduling

Sessions generally run from noon on Friday (or Saturday) until 9 PM and from early morning on Saturday (or Sunday) to 3:00-4:00 PM. These time frames are necessary to assure the minimum 128 hours of competency-based instruction.

Meals should be served in a room other than the session room. This avoids disruptions from meal set-up and clean-up.



Suggested Order of Session Topics

Session 1
History

Session 2
Inclusive Education

Session 3
Service Coordination/Case Management
Vision
Local Government

Session 4
Supported/Competitive Employment
Supported Living/Home of Your Own

Session 5
Community Organizing
Advocacy

Session 6
State Legislation

Session 7
Federal Legislation

Session 8
Parliamentary Procedure &
Serving on Boards
Graduation

NOTE: Assistive technology is not a stand alone topic but can be incorporated throughout the program, particularly in Sessions 2 and 4.

History

Purpose

The history of people with disabilities in our culture and society affects what happens today, and in the future. We must know where we've been before we can know where we're going and how to get where we want to be.

Competencies

- Participants will have an increased knowledge of the historical perspective of services for people with disabilities.
- Participants will be able to describe the history and role of the parent movement.
- Participants will be able to describe the history and role of the independent living movement.
- Participants will be able to describe the history and role of the self-advocacy movement.

Presentation Style and Skill-Building Activities

- This opening weekend is critical in setting the tone for the remainder of the program. Partners participants need a thorough and comprehensive view of history to provide a context for their dreams and actions for the future.
- See the Partners *Curriculum Highlights* for concepts.
- Lecture with visuals. Videos/DVDs/YouTube must be captioned.
- Videos on Ed Roberts, People First and/or Independent Living.
- Personal testimonials.
- Personal timelines or group timelines of history.
- Panel of Partners graduates.
- Self-advocacy speakers.
- Large/small group exercises on use of People First language.
- Ice-breaker for introductions of participants.
- What is Partners in Policymaking? Discussion of ground rules and contract.

Homework Options

- Visit an institution or large congregate care facility and/or an independent living center. If your area does not have an institution, interview an adult with disabilities who has lived in an institution.

- Reading materials provided by instructors and/or Coordinator.
- Partners DVDs:

“Partners in Policymaking: Sharing the Challenge”

(October 1998) explains the purpose of the Partners Program and the impact of the program on participants from the perspective of experts in the field, Partners graduates, and elected officials/policymakers. Videotape/ DVD formats are available upon request.

The North Carolina Partners Program produced a DVD, **“Partners for People.”** The benefits of this leadership training program and the personal growth experienced by participants are highlighted in their testimonials and stories. **“Partners for People”** can be viewed at the Council website, on their home page, at www.nc-ddc.org.

The Virginia Partners Program produced a DVD, **“Partners in Policymaking: The Fight for Inclusion for People with Disabilities.”** This educational documentary is about three Partners graduates, the life experiences that each brought to the program, and how the Partners program prepared them for their new leadership roles in influencing public policy.

Contact the Virginia Partners Coordinator, Teri Barker-Morgan at Teri.Barker@VBPD.virginia.gov or call (804) 786-9381 for more information about this DVD and/or to receive a free copy.

Key Terms

Independent Living Movement - Adults with disabilities seeking to achieve autonomy; to break free from institutional and/or custodial care. Independence means taking control of one's life.



Always think about who might be able to serve as a back-up speaker. You are welcome to contact the Minnesota Governor's Council on Developmental Disabilities to verify the previous experiences of speakers. A current National Speakers list is available upon request.



Self-Advocacy Movement - Adults with developmental disabilities speaking for themselves, instead of others speaking for them (People First Movement).

Parent Movement - Parents seeking basic civil rights, including the right of public education, for their children with disabilities.

People First Language - Replacing stereotypical words by putting the person before the disability.

Inclusive Education and Lifelong Learning

Purpose

Partners participants learn how children with disabilities can be successfully included in general education classrooms in their neighborhood school and how adults can enroll in post-secondary education. Current laws mandate a free appropriate public education, but the majority of children with disabilities are still “placed” in segregated settings. Partners participants need to learn how to be equal participants in team meetings.

Competencies

- Participants will be able to describe the reasons for an inclusive, quality education.
- Participants will be able to outline specific strategies to achieve an inclusive, quality education.
- Participants will be able to demonstrate how to be effective in team meetings.

Presentation and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- Lecture on best practices and how to achieve inclusion must be done by a national speaker with appropriate visuals (videos/DVDs must be captioned).
- Include information on inclusive early intervention for younger children and higher education opportunities for adults.
- Presentation about, and practice in, advocacy and assertiveness skills at an Individual Education Program (IEP) meeting.
- Roundtable discussion with key individuals from the Department of Education. (This should be a positive exchange, not adversarial).

Homework Options

- Assess or rewrite IEPs of children of participants.

- Assess the level of inclusion in local schools.
- Attend a meeting of a local or state Special Education Advisory Committee (SEAC) to discuss inclusion policies in a school district.
- Identify significant persons in a local school district (principals, special education director and superintendent); interview them to discuss inclusion.
- Attend school board meetings; get to know board members and other key officials.
- Videotape or audiotape yourself to review/improve performance in an IEP meeting
- Check out post-secondary education opportunities and options.
- Learn more about special ed law by visiting <http://idea.ed.gov/>.
- Check on the usage of technology in a local school – is it for ALL students?
- Read materials provided by speaker and Coordinator.

Hints on Selecting Education Roundtable presenters for the evening session

- Roundtable presenters should be representatives from early childhood, transition, due process and compliance, post secondary education, and other divisions. Each presenter should briefly explain what he/she does; then the Partners participants should ask questions. Introduce each person in the group. The officials then move to the tables in the meeting room – one educator per table. At a designated time, they rotate to other tables (“speed dating”). By the end of the exercise, each educator has visited with each table. Partners participants should be prepped on etiquette, protocol, and what issues should be addressed prior to the roundtable, followed by a debriefing after the departure of the roundtable members.
- Some states have systems-change projects that are working on inclusive education issues. Make sure this session creates opportunities for Partners participants to meet as many state resource people as possible.
- Most education board and department employees are resource people for Partners participants to call upon. Build alliances with these individuals.
- The idea is that every Partners participant makes a connection with several school/education officials.
- Avoid featuring a speaker who opposes inclusion or who has negative stories to tell. *Partners is not about “equal time.”* It’s about best practice and “what’s possible.”

Key Terms

Inclusion - Children with disabilities are full-time members in chronologically age-appropriate general education classrooms, in their neighborhood schools, with the necessary supports, curriculum modifications, and/or assistive technology.

I.E.P. - Individualized Education Program - An annual plan for a child’s education, written by a school team, which includes the parents and the student; mandated by IDEA.

IDEA - Individuals with Disabilities Education Act - The federal law which mandates education for children with disabilities (P.L. 108-446).



Local speakers can give testimonials about inclusion.

Service Coordination by Local/ County Government² and Vision

Purpose

Partners participants need to be able to compare best practices in service coordination/case management to the policies and practices of the service coordination offered in their area. With budget cuts becoming the norm in many places, and with state and/or federal responsibilities being shifted to local governments and/or non-profit organizations, its important for Partners to understand how these changes impact the lives of people with disabilities and consider what improvements can be made in service coordination.

Competencies

- Participants will be able to demonstrate their knowledge of the service coordination system and what services may be available.
- Participants will be able to demonstrate how to meet with a public official and discuss issues.
- Participants will create a shared vision with fellow participants for the year 2020 (and beyond) for people with disabilities.

Presentation Style and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- The basics of how to meet and speak with a public official or policymaker can be covered for the first time in this session, if the order of topics does not vary from the one described on page 22.
- Use *Making Your Case* to introduce participants to meeting with public officials. Copies of this publication can be ordered online at www.mnddc.org/extra/publication.htm. The interactive e-learning course “**Partners in Making Your Case**” can be accessed directly at www.partnersinpolymaking.com, and is intended to supplement and reinforce the knowledge and skills presented in the classroom session.

² For locations where county government is not applicable, Partners should develop relationships with local officials, such as school boards or city/municipal officials who take on similar roles.

- Lecture from a national presenter on preparing to meet with public officials is critical, followed by small group exercises to prepare a short presentation on a particular issue. Local government officials should be invited to hear from participants about issues of importance to them with round table discussions. These officials should give real feedback on Partners presentations.
- Representatives from local advocacy groups and intergovernmental associations can provide important information on community services.
- Building a shared vision – a participatory exercise involving a “high school reunion” and an opportunity to build a collective vision for the year 2020 and beyond. Learning to “dream big” is critical for Partners participants to learn before they can create change. The Joel Barker video, *The Power of Vision*, can be a helpful tool.

Homework Options

- Prepare a brief outline of the major points surrounding a critical disability issue to discuss with a local public official prior to the next session.
- Attend a local meeting or write a local official to introduce yourself and discuss a critical disability issue. Be prepared to discuss the experience during the next Partners session and turn in a written summary.
- Investigate local government web sites. How much of their business is conducted on line? Are the services provided online the type of services that people with disabilities use?
- Investigate the availability of Internet and other electronic information resources through local public libraries, university community outreach, or extension services.

Key Terms

Service Coordination (also referred to as case management) - Services that are available to people with developmental disabilities to help them become more self determined; and gain access to social, medical, educational, financial, and/or other services/benefits.



Key Terms

Assistive Technology Device - Any item, equipment, or system that improves the lives of people with disabilities.

High-Tech, Low-Tech, No-Tech - The range of sophistication of an assistive technology device.

Augmentative and Alternative Communication (AAC) - Technology devices or systems to supplement or replace oral communication; can include "talking machines," cell phones or electronic tablets/pads with communication "apps," eye-gaze technology, simple communication cards, or other methods.

Positioning - For persons with physical disabilities, the correct seating systems, including wheelchairs and other positioning devices, to maintain optimum health, freedom, inclusion, and productivity.

Smart Homes - Centralized and/or electronic control of lighting, appliances, and other products in the home, to improve convenience, comfort, energy efficiency, and security.

Universal Design - Barrier-free and/or easy-to-use products, buildings, environments, and/or programs/services that are equally accessible to people with and without disabilities.

For speakers on assistive technology,
also contact the following national organizations on technology:

Rehabilitation Engineering and
Assistive Technology Society of North America
1700 North Moore Street, Suite 1540
Arlington VA 22209
703-524-6686
TTY:703-524-6639
www.resna.org

AbleNet, Inc.
2625 Patton Road
Roseville MN 55113
800-322-0956
www.ablenetinc.com

Assistive Technology

Purpose

For people with disabilities, assistive technology can make the difference between independence and dependence.

Competencies

- Participants will be able to describe the state-of-the-art technologies for people with significant disabilities and apply technology devices to their own situation.

Presentation Style and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- Lecture with visuals, and demonstrations to illustrate the critical "why" and "how" of technology (videotapes/DVDs must be captioned).
- Presentation/information on local/state assistive technology centers and/or services available.
- Small-group exercises on how ordinary, off-the-shelf products can be utilized as assistive technology.
- Invite your technology council/assistive technology center to discuss how to access technology resources within your area. Find out if your area has a computer lending program, a mobile "library" on technology, or other services on assistive technology.

Homework Options

- Visit a technology center or a rehabilitation technology laboratory.
- Get retail catalogs of assistive technology devices and aids.
- Visit electronics stores to learn more about ordinary products available.
- Interview a therapist or other expert in the area of assistive technology and adaptive equipment.
- Read materials provided by instructors and Coordinator.
- Interview someone with a disability who uses assistive technology or adaptive equipment.

Community Organizing and Advocacy

Purpose

In previous sessions, Partners participants will have learned about best practices in disability issues relating to education, employment, community living, and legislative issues. It is also important for Partners participants to learn how to advocate for systems change in these topic areas, including organizing their communities for action and using the media.

Competencies

- Participants will identify strategies for beginning and sustaining grassroots level organizing around specific issues.
- Participants will understand the role of, and how to use, the media to effectively promote their issues.

Presentation Style and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- To teach community organizing, a national presenter and small group exercises are a must. Select an issue that's identifiable, small, and winnable. Have the groups plan a full campaign that includes a variety of tactics such as using the media, organizing meetings, and direct actions.
- For advocacy, representatives of state advocacy organizations can present a round table discussion on their advocacy organizations. Have presenters bring literature from their organizations for all Partners participants.
- Small-group exercises can help Partners participants learn techniques of successful advocacy.
- A member of the local media can present information on how to gain press coverage of disability issues. Partners can practice TV interviews on camera.
- Invite leaders of local, regional, or state advocacy organizations. Search for community organizers associated with churches, poverty groups, unions, or social justice organizations to be part of a panel.



Community Organizing -- Groups of people who share similar or related interests coming together and joining forces to change a situation or problem

Key Terms

Community Organizing - Mobilizing groups and individuals in a community around a particular issue to create positive change.

Homework Options

- Join a coalition that deals with a social justice issue. Pick a local project in your home community that's winnable. Build alliances with others.
- Research members of the local media to determine who covers, or is interested in, any of the following: education, employment, health and human services, legislation/politics, and/or disability issues. Make contact with the appropriate persons in the media and offer to be a resource.
- Join a listserv when advocating for specific issues, including legislative and policy decisions at local, state, and national levels.
- Read materials provided by instructors and Coordinator.
- Review online forums (listservs, newsgroups, chat rooms) on issues in which you are interested. Investigate online action alerts.

State Legislation³

Purpose

In order to influence policymakers at the state level, Partners participants need to be competent in and comfortable with the state legislative process. Partners participants all across the country have influenced legislation with their personal testimonies. This is a powerful avenue for systems change. Individuals must have the opportunity to practice giving testimony before real legislators and/or staff members. When the time comes for the real thing, Partners participants will be ready.

Competencies

- Participants will be able to describe how a bill becomes a law at the state level.
- Participants will be able to demonstrate successful techniques for advocating for services to meet the needs of unserved and underserved individuals.
- Participants will be able to prepare and deliver testimony for legislative hearings.

Presentation Style and Skill-Building Activities

- This is a stand-alone topic for one entire weekend.
- Lecture with visuals on the state legislative process by state legislator or legislative aide/staff (videotapes/DVDs must be captioned).

³ For locations that do not have a state policymaking level, please integrate these competencies into the session on another appropriate level of government.

- Tour the state Capitol to become familiar with the building(s).
- Mock hearing on real issue(s) at the Capitol to allow every Partners participant to deliver testimony in a realistic fashion. Invite experienced lobbyists (or other trainers experienced in public policy) to serve as coaches to assist and support the development of testimony. Invite legislators (and/or staff) to conduct mock hearings and to provide feedback to Partners participants on their testimonies.
- Short presentation by representative of Governor's Office about applying for governor-appointed positions and membership on committees.
- Provide handouts, including state legislative directory.
- Have Partners participants sign up for committee schedules, weekly summaries of legislative activities, email listservs, and other pertinent materials.
- Have Partners participants meet with their legislators or staff assistants individually at the Capitol. (This may require a change in the training session to Sunday/Monday or midweek.)

Homework Options

- "Shadow" (follow around) a state legislator for a day.
- Attend legislative hearings on any subject to get familiar with the process.
- Contact a state legislator by phone or letter to discuss specific legislation. This also makes the Partner's name known to the legislator.
- Search state legislative web site. See what critical legislative information is available, then evaluate its usefulness and timeliness.
- Send letters; make phone calls; testify at a hearing.
- Become active.



When selecting presenters within your state, consider contacting the Governor's Office, legislative staff, lobbyists, legislators, and disability lobbyists. This can be a once-in-a-lifetime opportunity for Partners participants to really get to know legislators and their staff.

Key Terms

Supported/Competitive Employment

Employment in a real job, for real pay in one's community.

Natural Supports - Using the same support system used by people who don't have disabilities (co-workers and friends) instead of agency job coaches or other paid assistance.

Customized Employment - A flexible process designed to personalize the employment relationship between a job candidate and an employer in a way that meets the needs of both. It is based on an individualized match between the strengths, conditions, and interests of a job candidate and the identified business needs of an employer. Customized Employment utilizes an individualized approach to employment planning and job development—one person at a time ... one employer at a time. (Source: U.S. Department of Labor; Office of Disability Employment Policy)

There are probably many resource people within your state who are active in supported/competitive employment. The “best practice” part of this topic must be done by a national speaker in order to gain the national perspective. An in-state speaker could supplement the presentation by the national speaker.

Supported/Competitive Employment

Purpose

Too many people with disabilities don't have an answer for one question: “What do you do for a living?” Real employment for real wages is a right most of us take for granted. For people with disabilities, the need is the same – to earn a living, to have a purpose, to achieve, to be connected and to have an identity.

In the past, the expectation was that people with disabilities would do best in a sheltered environment. Now we know that with the appropriate modifications and supports, people with disabilities can be successful in the careers of their choice.

Competency

- Participants will be able to describe the importance of supported/competitive employment opportunities.

Presentation Style and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- Lecture with visuals by national speaker on best practices and “what’s possible” in employment of people with disabilities (videotapes/DVDs must be captioned), including Customized Employment.
- Information on “career vision” for people with disabilities, instead of only getting entry level jobs.
- Large-or small-group discussion or exercise on natural supports – where to find them and how to get them.

Homework Options

- Create an employment position that uses the principles of customized employment.
- Develop a “career vision” utilizing natural supports. Investigate the impact of technology on employment of people with disabilities.
- Reading materials provided by instructors and Coordinator.

Supported Living/Home of Your Own

Purpose

It is important for people with disabilities to be included in the communities in which they live, to have a sense of belonging. For people with disabilities to achieve full inclusion, support may be needed. When the supports are in place, home ownership, independence, control over one's destiny, participation in and contribution to one's community are all possible. Partners participants need the skills to know how to get and maintain those supports.

Competency

- Participants will understand the types of supports necessary for creating a positive home environment.

Presentation Style and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- These topics can be presented in the same session, or they can be divided between two different sessions (supported living and family support) and combined with other appropriate topics.
- Lecture with visuals by national speaker(s) on best practices and “what’s possible” in supported living and family support issues (videotapes/DVDs must be captioned).
- Small-group exercises to teach/practice person-centered planning/self-directed planning activities.
- Large- or small-group discussion/exercise on natural supports – where to find them, how to get them.
- Lecture on support systems at the state level for adults and children with disabilities, including family support and Medicaid waivers.

Homework Options

- Visit both congregate living arrangements (ICF/DD, small group home, large group home) and a “home of your own” location.
- Identify natural supports in the community.
- Identify ordinary activities and locations that people with disabilities can utilize in their own communities to promote inclusion.
- Read materials provided by instructors and Coordinator.

Key Terms

Supported/Independent Living - Living in a typical home or apartment of one's choice and choosing with whom to live; using the supports of one's choice (natural supports or paid supports).

Natural Supports - The same unpaid typical community supports used by people who don't have disabilities: friends, neighbors, and co-workers.

Family Support - Funding and services to enable families to keep children with disabilities in their home environment instead of out of home.

Person-Centered Planning - Has multiple meanings; this process refers to placing the person with a disability first, beginning with strength, gifts, and capacities, and not test scores.

To ensure participants learn best practices within these topics, national speakers are needed to present “what’s possible.” Local speakers can provide perspectives on Independent Living Centers in the state and on service coordination/state service systems, family support and Medicaid waivers.



Enlist the help of Congressional staff members in your area. Also, seek out lobbyists in the disability field and others who work at the federal level.

Federal Legislation⁴

Purpose

Becoming competent in federal legislative issues has never been more critical for Partners participants; they must learn how and when to influence their legislators and other policymakers at the federal level.

Competency

- Participants will be able to prepare for and meet with Congressional delegation members or staff.
- Participants will be able to identify critical federal issues and the process by which they can personally address their concerns.

Presentation Style and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- This topic can be presented with supported living/home of your own or supported/competitive employment, or with other appropriate topics.
- Lecture with visuals by national speaker to demonstrate the legislative processes within federal government (videotapes/DVDs must be captioned).
- Update on current and future events/hot topics at the federal level relating to disability issues and funding.
- Invite Congressional staff to attend this session in order to role play “meeting a public official” and help participants learn protocol and etiquette.
- Small-group activity to simulate a group visit to a federal legislator; have Congressional staff critique efforts.
- Presentations on federal legislation that is pending.

Homework Options

- Call or visit the local office of a U.S. Senator or Representative.
- Write letters or email federal officials about a current issue (if appropriate) or simply inform them of the issues facing people with disabilities in the area.
- Volunteer to work on a disability advisory committee of a member of Congress.
- Develop a relationship with the local staff person of a Senator/Representative.
- Offer to provide ongoing information about disability issues to members of Congress.
- Obtain a Congressional directory.

⁴ For locations that do not have a federal policymaking level, please integrate these competencies into sessions on another level of government, as appropriate.

Parliamentary Procedure and Serving on Boards

Purpose

Partners participants have learned about best practices in disability issues relating to education, community living, and legislative issues. They have learned how to organize communities and use the media. They also need to know how to run an effective meeting, and participate effectively in a meeting.

Competencies

- Participants will be able to demonstrate proper procedures for conducting a meeting.
- Participants will gain a basic understanding of parliamentary procedure and serving on boards.

Presentation Style and Skill-Building Activities

- See the Partners *Curriculum Highlights* for concepts.
- Lecture providing “how to” information on boards, meetings, and parliamentary procedure, with small-group exercises to help participants practice skills for planning and conducting successful meetings.
- The idea of studying parliamentary procedure may not be appealing to most people, but it is a very important topic to enable Partners participants to influence their futures and the organizations with which they’re affiliated. Happily, there are speakers who can present an entertaining, engaging, and educational approach to this topic. Most Partners participants respond with very positive evaluations.
- Board training may be widely-available through United Way, League of Women Voters, and other community associations.

Homework Options

- Read materials from presenters.
- Analyze the most recent or the next meeting you attend(ed) for its use of appropriate parliamentary procedure.

Key Terms

Parliamentary Procedure - The official protocol used in board meetings.

The following groups may also be helpful in securing speakers on Parliamentary Procedure:

**American Institute of
Parliamentarians**
550 M Ritchie Hwy, Suite 271
Severna Park, MD 21146
888-664-0428
Fax: 410-544-4640
www.aipparl.org
E-mail:
aip@parliamentaryprocedure.org

**National Association of
Parliamentarians**
213 South Main Street
Independence, MO 64050-3808
816-833-3892
888-NAP-2929
Fax: 816-833-3893
<http://parliamentarians.org>
E-mail: hq@nap2.org

Graduation

The end of the Partners year and the beginning of new lives, new dreams, and new realities for people with disabilities and families in your state.

Ensure that your state's graduation reflects the quality of your entire program.



Graduation

Graduation is a time of reflection and renewal. The eighth and final session will include a ceremony to honor graduating Partners participants and send them on their way. The scheduled curriculum needs to be covered on Friday afternoon and evening, and Saturday morning. The graduation ceremonies can begin with Saturday's lunch.

Invite a representative from the **Governor's office and/or a state legislator** to present a short congratulatory message to the Partners participants. In addition, invite representatives from your state's Council on Developmental Disabilities (or other funding source) to the Saturday luncheon and graduation. But remember to keep the focus on the graduates, not on invited guests.

After lunch, with all Partners participants and guests in attendance, each Partner can take a few minutes to describe what the program has meant to him/her and to briefly outline what they plan to do with their new skills. For most, graduation is a very emotional time.

Some programs encourage Partners participants to invite family members to the luncheon and/or any specific graduation activities. Others encourage Partners participants to extend a personal invitation to policymakers (state or Congressional members, heads of agencies, local politicians) to attend graduation as their guests. This is a prime opportunity to showcase the Partners program to interested guests. Coordinators may want to discuss graduation options with the class.

In many states, a group photograph is taken of the class at the sixth session. If the first one doesn't turn out well, a second photograph can be taken at the seventh session. This memento is presented to each Partner at graduation. Partners participants should also receive a graduation certificate; pins or bags with the Partners in Policymaking® name may also be given to graduates. Advocacy organizations may donate complimentary memberships to graduates.

Between the seventh and eighth sessions, provide Partners participants with a professional press release from the funding agency which they can send to their local media.

Plan your final session so that graduation ceremonies are the last item on the agenda. All the training should be completed prior to the actual graduation. Ceremonies at any other time during the weekend don't make sense! Graduation testimonials/presentations by Partners graduates, greetings from faculty, and messages from other states can add to the celebration.

Other Possible Topics

Behavior

Behavior is often a barrier to inclusion for some people with disabilities. This issue can be resolved when behavior is viewed as a form of communication and methods and supports are used to lessen or prevent "inappropriate" behaviors. Partners participants should be able to describe the importance of these positive approaches to behavior change.

Presentation style and skill-building options include combining this topic with a complementary one; a presentation by a national speaker on best practices and "what's possible" in positive behavior approaches; and role-play and small-group exercises to demonstrate methods and interactions. Homework is to read materials provided by instructors and Coordinator.



What are Partners participants doing after they graduate?

Do you ever hear from them again?

Do they ever hear from you again?

Do you know where graduates are?

Do you know what they're doing?

If you don't know, who does?

Beyond Partners

Is there any way Partners graduates stay connected with each other or with what's happening at the Council on Developmental Disabilities, the funding organization, or other significant disability organization(s)?

Are Partners graduates viewed as a valuable group in your state? Do you get requests along the lines of, "Do you know a Partners graduate who can ... (present testimony, serve on a board, write an editorial, appear on TV, provide technical assistance)?" If not, something's amiss.

As Coordinator, you have the privilege of connecting your graduates to those in your state who can use their Partners expertise along with their own life experiences to create positive changes. Graduates have the responsibility to use their training in ways that enhance their own lives, the lives of a family member, and the lives of people with disabilities in their communities. Each person has her/his own unique gifts and talents to contribute.

Some graduates may not require any post-graduate support. They're out in their communities, doing what they're supposed to: changing systems – changing the world!

Other graduates may need some assistance with networking and staying abreast of the issues. All graduates could benefit from regular communication from the funding agency or organization that operates the Partners program.

Use the following methods of post-graduate support:

- **Graduate workshops:** Bring a class back together six months after graduation and/or have one training weekend per year, bringing together every graduate of your program. These activities are funded in whole or in part by the funding agency. They provide graduates with an opportunity to reconnect with graduates from the same class, make linkages with graduates from other classes, and get the latest information on best practices in disability services. These events should also provide opportunities for Partners graduates to expand their networks of policymaker contacts.
- **Communication:** Ensure that Partners graduates are on the lists or connected to the Council on Developmental Disabilities; Protection & Advocacy agency; University Centers for Excellence; organizations/agencies affiliated with disability advocacy, systems change, and legislative issues; and other listservs or social media.

- Make sure these groups notify Partners graduates of special events, training, and new resources. These contacts will help Partners participants continue to build their leadership skills long after graduation.
- Some states report they assist their graduates in setting up mentorship programs after graduation with policymakers in the state. Graduates spend 60 volunteer hours over one year with their mentors.
- One state provided post-graduate support by sending Partners graduates to Washington, D.C. to attend governmental seminars; the funding agency covered all expenses.
- Compile and distribute Partners directories, with names, addresses, photos, and brief bios of each Partners graduate.
- One way to keep Partners graduates active in systems change is to provide funding to enable Partners graduates to present legislative testimony and make conference presentations.
- Refer Partners graduates to the national Partners in Policymaking listservs⁵, web pages for continued resources and national networking, and Facebook pages (www.partnersinpolicymaking.com/resourceslistserv.html). There may be a state web site where participants can be directed and/or create a listserv of Partners graduates in your state so announcements can easily be sent to them. Promotional material and other technical assistance on using these Internet tools are available from the Minnesota Governor's Council on Developmental Disabilities (www.mnddc.org).



Use the long-term surveys (see Quality Improvement, page 53) to compile critical information about activities after graduation. Remember that your state has invested thousands of dollars in leadership training—make sure you have the documentation to prove that the funder's dollars are resulting in Partners efforts in systems change. Your funding organization expects it! These surveys also provide key information about the types of support Partners graduates need.

⁵ To subscribe and unsubscribe to the Partners in Policymaking listserv: Address an email message to: <major-domo@iglou.com>

Type the following in the message area: Subscribe pnpolicy Your name Send the e-mail message and expect a reply within 48 hours.

To unsubscribe: Send the email message to <pnpolicy-request@iglou.com> and type: Unsubscribe in the message area.

If you are unsubscribing because you have changed your email address, send the unsubscribe message from your old address; then send a new subscribe message from your new address.



Guidelines and Helpful Ideas

This section contains some guidelines and helpful suggestions in a number of areas:

Recruitment and Selection – Steps in selecting Partners participants, a timetable, and rationale for including parents of young children and self-advocates.

Creating a Welcoming Program – Making the space and information accessible and supportive for all Partners participants.

Skill-Building Activities – Engaging participants in a variety of learning approaches.

Funder-Program Relations – Mutual expectations based on involvement and accountability to the model.

Budgets – What you can expect to provide with varying amounts of funding.

Quality Improvement – The evaluation of sessions and speakers, involving participants and Coordinators in the evaluation process.

Recruitment and Selection

Timing

No matter where you are in your Partners year right now, start thinking about recruitment of the next class. If your recruitment efforts are yielding a large number of qualified applicants, you can take a break until it's time to start the process again. If you're having difficulty putting a class together, read on.

Begin your recruitment efforts at least four to six months before the first session.

- The #1 recruitment source is Partners graduates.
- Use your Council on Developmental Disabilities' mailing list or listservs as a start.
- Tap into any other lists you can access. Often, disability organizations won't release their mailing lists to anyone, but there are still ways you can use their databases. Ask them to put a story, paragraph, or announcement about Partners recruitment in their next newsletter. Or, make copies of the announcement and/or application and ask that they be inserted with the next electronic newsletter for that organization.

- Blanket your state with announcements/application forms.
 - Reach beyond the typical disability organizations to notify the largest possible audience.
 - Churches, medical facilities, schools of all kinds, therapy clinics, child care centers, and other entities are just the tip of the iceberg.
 - Use newspaper bulletin boards, retail bulletin boards, web sites, and radio.
 - Post your application on your web page; create a Facebook page and/or use other social media.
- One Coordinator had good luck using email to contact social workers in her state—they helped spread the news.
- Once the application forms start rolling in, have your Selection Team ready to go.

Coordinators use a variety of methods to review and rank applications. Basically, you want reviewers whose opinions and values you respect. The Coordinator and other Partners staff members need to be on the Selection Team. Partners graduates as well as Council members/staff or funding source representatives could be on the Selection Team.

The selection process is difficult and time-consuming, but the efforts will produce unbelievable results for the future.

A suggested timeline for recruitment looks like this:

- Six months before first session: send out applications (and continue for next two months).
- Three months before first session: Selection Team meets to review applications and select participants.
- One-two months before first session: notify selected participants.

Steps in Selecting Partners Participants

- After the deadline for receiving applications, the Coordinator reviews the applications.
- If there are any applications that are clearly outside the criteria (for instance, a person who is neither a parent nor a person with a disability), remove those applications and send a letter of non-acceptance.
- Make copies of the remaining applications and send to Selection Team members, or send applications electronically for rating and ranking (see the discussion above about membership on the Team). In addition, send each reviewer the instructions for rating and ranking applications.



- At a meeting of the Selection Team, review each application including the rating and ranking scores. Sort the applications into three groups – very strong candidates, possible candidates, and unlikely candidates.
- The Coordinator compiles all scores, ratings, and rankings from the reviewers and derives a composite score which is added to the Chart.
- At this point, a thorough review is made regarding each demographic area. Final decisions ensure a balanced group (males, minority, rural/remote areas, age of child, etc.).

Forms are available at the Partners website under Coordinator Resources, www.partnersinpolycymaking.com/classroomcoordinators.html, or enclosed in the replication packet.

Why Select Parents of Young Children?

The majority of participants in a given class of a quality Partners in Policymaking program should be parents of young children, birth through age 8:

- In general, parents of young children don't have deep allegiances to "traditional" organizations and approaches that were established in the early days of the Parent Movement. Thus, they're more receptive to new approaches and best practices. You want participants who have not yet been influenced by the status quo and who are open to fresh perspectives.
- Most parents of young children are probably not yet "leaders" and/or have much experience in advocacy and systems change. Your training dollars will reap the greatest benefits when you train the "inexperienced," rather than essentially "retraining" parents who are already involved in advocacy/leadership roles. Experienced parents are already "out there;" since annual funding of a Partners program permits you to train a limited number of people, you'll get the most "bang for your buck" by training the "inexperienced."
- Existing advocacy organizations are aging. Partners in Policymaking programs should aim to develop leadership for the coming decades. Parents of young children can make the greatest changes over the lifespan of their own children and, by extension, on behalf of others with disabilities in their state.

Responses to common objections about focusing resources on parents of young children:

Objection 1: A Partners program should include parents of children of all ages, including parents who have adult children with disabilities. To do otherwise is discriminatory.

The focus of Partners is systems change in the 21st century. The most effective way to change systems is from the ground up. Parents of young children are at that ground level. Every Partners program is investing thousands of dollars in its participants. You will get a greater return, over time, with parents of young children.

Some parents have had very negative encounters—maybe for years—with school systems and/or the service system in general. Many are angry and bitter (perhaps justifiably so), and don't believe things can change, despite new information presented by state-of-the-art Partners presenters. Thus, you don't want potentially effective advocates (parents of young children) to be negatively influenced by the pessimism of parents who have been "in the trenches" for too long. Many Partners coordinators who have selected "all parents" have seen this poisonous impact. Remember that your participants will have the opportunity to learn from a given presenter only during one weekend of training, while the participants are together over numerous weekends. Thus, despite your best efforts to bring in the highest quality presenters, younger parents may be more heavily influenced by experienced older parents, instead of a presenter, simply because they're together longer.

When parents of young adult children (ages 18 and up) apply to Partners, recognize that this is not a problem, but an opportunity: recruit the young adult son or daughter instead of the parent!

Objection 2: It's difficult to locate only parents of young children. They're not yet in the system, so they're not on mailing lists.

Right—and those are exactly the parents you want to attract! Since these parents may not be associated with traditional disability organizations, your recruitment efforts must go beyond the norm.





In addition to the usual disability organizations, target places where parents of young children may be connected: pediatric medical offices, therapeutic clinics, churches, child care and/or early childhood centers, hospital neonatal intensive care units, parent-to-parent groups, etc. Also, talk to Partners graduates about their suggestions on how best to recruit parents of young children.

Objection 3: Parents of young children can't make the commitment to attend all sessions because of child care issues.

Many parents of young children, especially mothers, may have never left their children in the care of someone else prior to Partners. They may be reluctant to commit to Partners even though they are excited about the possibilities.

If you have a high quality candidate in this position, and your own assurances aren't enough, consider enlisting the help of a Partners graduate to reassure the candidate that she/he and her/his child will survive the separation! Remind the parent that the cost of child care if appropriate, will be covered.

Parents + Adults with Disabilities = Success

Partners distinguishes itself from other leadership training programs in that it brings together adults with disabilities and parents of young children with developmental disabilities. The two groups learn from each other, bond together, and recognize the similarities of their issues, then work on each other's issues.

The most promising benefit to every Partner is the critical recognition that the disability movement is broader than one group, one type of disability or one issue.

Adults with disabilities learn from the parents – their personal perspectives and life experiences—and receive these benefits:

- Knowledge and understanding of what their own parents felt and experienced.
- Support and encouragement as they work through the emotions and activities inherent to their own emancipation process.
- The recognition (often for the very first time) of the value of their own life experiences to be a teacher to others.
- The opportunity to educate parents about what it feels like to live with a disability, what's really important and what's not, and how to help their

children be as self-reliant and productive as possible, as early as possible.

Parents learn from adults with disabilities—their personal perspective and life experiences—and receive these benefits:

- A broader perspective regarding their child’s future: looking at the long-term - the big picture, not just the next school placement.
- The realization that they (parents) must change before they can expect others to change—they must begin to have high expectations for their children.
- An understanding of the concept of “emancipation” so that parents can encourage self-advocacy in their children as early as possible; allowing parents to have the courage to “let go” and allow children the dignity of risk.
- The recognition of how their child’s earliest experiences in school, community and friendships – both positive (inclusion) and negative (segregation) – will affect the adult years.

Ratio of Parents and Self-Advocates

Some Partners programs decide to have a class of 50 percent parents and 50 percent adults with disabilities, in an attempt at “fairness.” Other programs gauge the needs of the adults with disabilities, and therefore, the potential number of personal assistants who may accompany the self-advocates, and create a class with a lower percentage of adults with disabilities. The ratio can be a critical factor in the overall success of your Partners program.

It’s critical to create and maintain a cohesive group of Partners participants who will bond with each other; it’s vital for parents and self-advocates to bond with each other (instead of parents bonding only to other parents; self-advocates bonding only to other self-advocates). If the ratio of adults with disabilities is too high (and too many assistants are present), the potential for deep, personal connections between adults with disabilities and other classmates is diminished—the assistants may get in the way, and those long-lasting bonds between participants are not made.

In the best-case scenario, the Partners coordinator will publicly—and repeatedly—encourage natural peer assistance: classmates helping one another. This can reduce the dependence of self-advocates on paid professionals; help self-advocates learn that they can get assistance from anyone (not just paid staff); allow parents

*Durante el curso de
Coloaboradores en Lieberazgo,
yo cambié de una person
a que no se sentía cómoda
alrededor de personas con
desabilidades, a una persona
que tienes muchas personas
desabilitadas como amigos.*

*(During Partners, I changed
from someone who was not
comfortable around people
with disabilities to one who
has many people with
disabilities as friends.)*

Partners graduate from Colorado

to learn valuable lessons from self-advocates that will help them be better parents to their own children; and forge closer bonds among participants.

Some Partners programs have achieved great success by scheduling a meeting with self-advocates and their assistants prior to the beginning of the first session to review expectations:

- Assistants are not members of the class; they're in attendance as support only.
- If the Partners participant needs the assistant only for personal care (bathing, dressing, etc), the participant can decide whether or not the assistant should be in the meeting room during presentations.
- Assistants will be seated at tables in the rear of the meeting room and will move to participant's side only when requested by the participant. During meal times, the participant will determine if he/she needs the assistant to help with eating. During the training sessions, assistants do not participate in learning activities, ask questions of the presenters, etc. But they're welcome to interact with presenters and/or participants during breaks, mealtimes, etc.
- Assistants should not speak for the persons they're supporting unless the assistant "translating" the person's speech is the norm.
- Depending on the cumulative needs and desires of participants, the Coordinator can discuss with participants the possibility of one or more persons sharing one or more assistants during the Partners training sessions, instead of each person with a disability having his/her own "one-on-one."
- While assistants are not "official participants" of the Partners program, they will receive very valuable benefits of the Partners program vis-à-vis learning from the presenters if they're in attendance during the training sessions.

Every effort should be made to encourage and facilitate close relationships between parents and self-advocates. Most of us are "creatures of habit," and participants will normally sit at the same table, in the same chair, each time. Thus, the Coordinator should routinely request that participants sit with different people at every session, during mealtimes, etc. We should never see one table that's composed only of people with disabilities, for example. The Coordinator needs to be aware of the inclination for people to unintentionally create cliques. If participants are resistant to voluntarily "mixing it up" at every session, the Coordinator can assign seating with the use of "table tents." Small group activities should always have different combinations of participants (e.g., not all parents or all people with disabilities in any one group).

Creating a Welcoming Environment for All

A Partners program must be a model of inclusion; the physical and social environment must be supportive of and respectful of all participants.

Adhering to the following guidelines can ensure your program is a model of a welcoming, inclusive environment for all:

- Plenty of space at every table in the meeting and eating rooms for people who use assistive devices.
- All the tables in both the meeting rooms and the eating rooms have supplies of flexible straws.
- Partners participants who use assistive devices can sit at tables in the front of the room as well as in back. Ensure that they are not limited only to the tables closest to the door, and that people using wheelchairs do not have to congregate at the same or one or two tables.
- Everyone who speaks during a session, from presenters to Partners participants asking questions, uses a microphone so that everyone can hear what is being said.
- Electrical and/or microphone cords are placed and covered by mats and/or taped down so they do not pose a danger.
- The podium, projection screen, and any other visual aids are positioned to allow unobstructed viewing by all Partners participants.
- Buffet and snack tables are arranged to allow everyone, including those with visual and physical disabilities, the opportunity to serve themselves as independently as possible; no “elevation” of serving dishes on buffet tables.
- All other parts of the meeting site, including sleeping rooms, lobby areas, restaurants and bars, restrooms, entrances and parking areas are accessible to people with disabilities.
- Sufficient time is built in at breaks to accommodate everyone’s needs.
- Large print, Braille, modified, or other language materials are provided to those who need them at the very same time others receive their materials.
- Allow the use of personal devices for recording.
- When dimming the lights for an audio-visual presentation, the needs of Partners participants with vision or hearing disabilities are taken into account.

- Skill-building activities (role play, small group exercises) provide opportunities for full and equal participation by all Partners participants.
- Partners participants who need help reading and/or comprehending new information receive modified materials (handouts and reading assignments). And, they receive their materials either at the same time as others or in advance. Encourage the use of online materials and links to save paper.
- The needs of Partners participants with disabilities are discussed openly and honestly, in an adult fashion, with the person directly. The person providing the assistance should do so with the input of the individual needing the service/ support. Others in the class should be made aware of and educated about these needs so that everyone assumes some responsibility for assisting each other.
- People with speech difficulties and/or communication devices should be given the time to fully express themselves.
- Paid and/or volunteer helpers are there to support people with disabilities and not get in the way of Partners participants getting to know one another. Partners participants should be able to depend on the natural support of each other, as friends always do. Keep a balance between these two scenarios.

Skill-Building Activities

To ensure Partners participants develop the Partners competencies, Partners participants should engage in a variety of learning modes. In some cases, a PowerPoint presentation is the most effective way to deliver information. In other cases, skill-building activities are better alternatives. Whenever appropriate, speakers should use participatory activities to enhance the learning process. Adult education requires additional attention to these types of activities – differences in learning styles are more pronounced and less likely to change with adults than with children.

Role Play can be effective when learning about such topics as IEP meetings, IHP meetings, legislative testimony, meeting a public official, service coordination meetings, parliamentary procedure, and contacting media personnel. Role play allows Partners participants to try out their new skills in a realistic setting without the stakes being as high as in the actual situation. It is better to make mistakes now and learn from them, than to do so during that first shot at testimony or in that precious five-minute (or less) meeting with a legislator. In fact, people often

report that role-playing a situation is much harder than the real thing. The people playing the other roles are often familiar to the Partners participants, and they tend to know the subject in more detail than most policymakers.

Demonstration can be effective when learning about such topics as assistive technology and positioning for people with physical disabilities. There is no better way to know about the benefit of a particular device than to see it in action. These types of demonstrations allow parents and self-advocates to try out new and different equipment, without any pressure to buy (as when in a store) or to accept the opinion of a professional who may be recommending the product.

Small-Group Activities can be effective when learning about such topics as how to influence others to use People First language; brainstorming effective team meetings (IEP, IHP); preparing for a person-centered planning session; preparing for a meeting with educators or legislators; brainstorming ways to utilize assistive technology; advocating for people with disabilities; vision-building exercises; and organizing a grassroots campaign.

Other Ideas

- Partners participants can develop their own “time line” to get a sense of the paths that led them to the leadership role they have assumed by participating in the program.
- Partners participants can draw a bus to describe how the system feels to them as an introduction to quality issues. The key questions are “Who’s driving the bus? Who’s on? Who’s off? Does the bus have any tires? What fuels the bus? Where is the bus going?”
- A crucial activity to practice is getting across a quick story to a public official who a Partners participants may happen to meet in a hallway. It’s useful to have the three main points of an issue ready to brief a policymaker in the way that is most effective and most likely to create change. Partners are encouraged to practice using online resources available at the Partners website.

Coordinators are encouraged to enroll in courses on facilitating meetings and how to conduct training courses.



Funder-Program Relations

Funders make significant investments and commitments when they fund Partners. The return on the investment is long term – Partners graduates across the state achieve successes in legislative advocacy, systems change and grassroots organizing. The relationship between a funder and a Partners program is more than that of a giver and receiver. Funders expect documented outcomes. Partners programs expect financial, programmatic and promotional support from funders.

Funders and Partners programs form a bond that transcends the financial association. For this relationship to be mutually beneficial and result in the program outcomes, the expectations of both parties should be clearly understood.

Expectations by Partners Programs of Funders/Sponsors

Partners programs should expect the following from funders:

- Assure hiring of a qualified Coordinator who is competent as a training director.
- Incorporate the Coordinator's Essential Duties (outlined in the Quality Standards section of this handbook) into the Coordinator's job description and/or contract.
- Fully fund the program for the eight sessions required to ensure all competencies are achieved by Partners participants.
- Require regular, timely debriefings and full reports to the funder from the Coordinator about the Partners program.
- Request personal testimonials from Partners graduates about their experiences in the program.
- Encourage and assist Partners graduates to serve on policy boards.
- Retain an outside, independent evaluator to measure the program's outcomes by conducting initial, six-month, and long-term surveys of Partners participants. Encourage the use of online surveys rather than paper. Maintain a file of these evaluation reports. Encourage frequent evaluations during each weekend session so the Coordinator can get immediate feedback.
- Representatives from the funding agency should attend Partners sessions and graduation as guests. During training sessions, they should be seated at the back of the room (and not participate in training sessions or activities); during mealtimes, they can mix and mingle with participants.
- Provide funding for graduate activities separate from the basic program.
- Add Partners graduates to listservs and other networks.

- Determine and clearly communicate what the connection should be between the funder and Partners graduates, then create and maintain the supports to preserve that connection.

Expectations by Funders/Sponsors of Partners Programs

Funders should be able to expect the following from the Partners program:

- Hire a Coordinator who is competent as a training director.
- Provide debriefings on sessions, either monthly or quarterly as worked out with funder. Some funders may require quarterly reports, plus informal information provided after and before each Partners session.
- Provide personal testimonials from Partners graduates about their experience in the program.
- Support graduates through information, referral, and connections.
- Assist the independent evaluator.
- Make a commitment to improve the program through frequent measurements.

Budgets

Budgeting and financial management are some of the crucial issues that Partners Coordinators deal with in relationship to their funders. The program may be budgeted based upon a per-person cost estimate. Programs have a variety of cost constraints. The following information details what you can do with different per-person cost limits. Obviously, the more funding there is per participant, the fewer controls and limits are required for spending; simultaneously, more funding does not mean irresponsible spending. While economies do not have to be enforced as much with higher spending levels, they should not be passed up.

Programs with \$4,000 to spend for each Partner can typically afford:

- A part-time Coordinator. The program becomes part of his/her existing job duties.
- Meals/lodging/meeting room space outside of a metro area. This saves on the hotel costs.
- Box lunches; buffet breakfast/dinner, selected in advance by the Coordinator.
- Two or three people to each sleeping room.
- Partners participants in local area may/may not stay overnight.
- Partners participants carpool.
- Posting all material online and providing paper copies as an accommodation.





- Reasonable maximum on respite, personal care assistants (PCAs), support services (per hour cost). The program pays these costs.
- Check and compare airline ticket prices in advance; purchase when prices may be lower (i.e. 21 day advance, or Saturday stay over).
- Interpreters/facilitators.

Programs with \$5,000 to spend for each Partner can typically afford:

- Part-time Coordinator; the position may be contracted out.
- Meals/lodging/meeting room space within or outside of metro area; meals selected in advance by Coordinator; buffet or sit-down service.
- One or two people to each sleeping room.
- Encourage carpools, but individual travel OK.
- Posting materials and online forms. Paper copies are an accommodation.
- Set maximum per hour cost for respite, PCA, support services.
- Purchase airline tickets at best price time. Encourage Saturday stay over.
- Interpreters/facilitators – arrange with someone the participant knows; share costs.

Programs with \$6,000 to spend for each Partner can typically afford:

- Full-time Coordinator and part-time assistant to help with logistics.
- Meals/lodging/meeting room space within metro area; meals selected in advance by Coordinator.
- All Partners participants may stay overnight at hotel.
- Partners participants may travel individually.
- Pay all respite, PCA, and support service costs. May set maximum per hour cost.
- Interpreters/facilitators – program recruits and program pays.
- Higher prices for air travel for presenters.

Programs with \$7,000 to spend for each Partner can typically afford:

- Full-time Coordinator and part-time assistant. May contract out for logistics.
- Hold in metropolitan area.
- Single, maybe double rooms.
- All Partners participants stay overnight.
- Meals – pick from the menu.
- Snacks/beverages in addition to meals.
- Don't require/encourage Saturday stay over for presenters. In and out on the same day is OK.

- Partners participants travel individually; may be able to increase the maximum for mileage reimbursements.
- Program may be able to pay all respite, PCA, support services.
- Program arranges and pays for interpreters/facilitators.
- Use copying services and post materials online.

Critical Variables to address

- Location: Metro or non-metro.
- Coordinator: Full-time, part-time position or contractor.
- Lodging: All Partners participants or only out-of-towners stay overnight; one, two or three people to a room.
- Meals: Select meals and types of service in advance.
- Travel: Watch for airfare specials. Insist on car pools.
- Support Services: Set a reasonable maximum per hour cost and enforce it.
- Handouts/resource materials: Seek best cost for posting and copying.
- Presenter fees: Negotiate a reasonable fee/set guidelines (per day).

Quality Improvement

There are three important components to ongoing evaluations within a Partners program:

- Session Evaluations
- Evaluations by Speakers
- Participant Surveys

Long term studies of your program benefit you and your funders. Evaluations during the training and long term data collection help maintain a quality program.

The success of a Partners program is not simply whether or not you have a great group of folks who want to do great things—the success of the program can only be measured by outcomes after graduation.



Session Evaluations

Session evaluations should accurately measure whether or not Partners participants are achieving the competencies. Partners is competency-based, so ensuring and being able to demonstrate that competencies have been achieved is critically important.

It is one thing for Partners participants to rate presentations, speakers, and/or activities highly, but it must also be demonstrated that the instructors and activities enabled participants to achieve the appropriate competencies. The power of Partners comes from being able to demonstrate that participation in the Partners program enables participants to become more independent, self-determined, productive, integrated, and included in all areas. The financial investment in your Partners program needs to result in graduates who are competent in best practices and systems change advocacy.

Evaluations by Speakers

To maintain the highest quality program, Coordinators need as much information as possible. Some Coordinators find it valuable to interview or survey their speakers after each session. This information can help Coordinators in a variety of ways: from fine-tuning logistical issues to creating better methods of educating Partners participants.

It's important that Coordinators work closely with presenters, from the initial contact through the actual presentation. Coordinators and speakers can form a partnership that enhances the learning of all Partners participants.

Honesty and integrity are crucial components of that partnership. Coordinators can and should be specific in detailing what competencies a presenter should be addressing, as well as other aspects of the presentation, resource materials/handouts, and activities. Speakers need to inform Coordinators of any positive or negative experiences with the Partners program. Presenters' opinions often provide Coordinators with a new perspective and/or critical information to enable Coordinators to improve the training.

A Speaker Evaluation form is available at the Partners website under Coordinator Resources. It can be used to gather vital information from presenters. This form can be given to speakers at the time of their presentations, mailed to them after they return home, or posted online. The Speaker Evaluation form should

be mailed back or submitted electronically to either the Coordinator, the outside evaluator, or the funding agency.

Remember: if you're unwilling to take suggestions from the speakers, the program cannot benefit from their national perspective on the training of Partners in other states.

Participant Surveys for Program Evaluation

- The Initial Survey should be provided to participants, via Email attachment or regular mail, before the start of the first session. Each participant can bring the completed survey to the first session or return it by Email or regular mail prior to the first session.
- Six months after graduation, send the Six-Month Survey to graduates, or have them complete and submit the Survey online.
- One year after graduation (as well as two, three, four, and five years after graduation), send the Long-Term Survey to all graduates or have them complete and submit the Survey online.

Program evaluation need not be costly. Work with a local university to locate the right person to be your independent evaluator, such as a student or teacher from the areas of education, public policy, or statistics.

The initial Six Month and Long Term Surveys (see Coordinator Resources at the Partners website) are all completed anonymously. The outside evaluator assigns an identification number to each participant. This number is used throughout every survey. Participants return the surveys directly to the evaluator in the self-addressed, stamped envelopes included with the surveys or submit electronically. The reports prepared from the survey data should reveal both qualitative and quantitative data.

The surveys document that Partners graduates are, in fact, achieving systems change through legislative advocacy, grassroots organizing, and assuming leadership in policymaking positions. Surveys and session evaluations provide the hard data to justify a funder's decision of funders to continue funding Partners.





Policy and Guidelines – Conduct

The following policies and guidelines have been adapted from Minnesota Department of Administration policies. The wording applies to Minnesota, so edit appropriately for your location.

The statements cover the following:

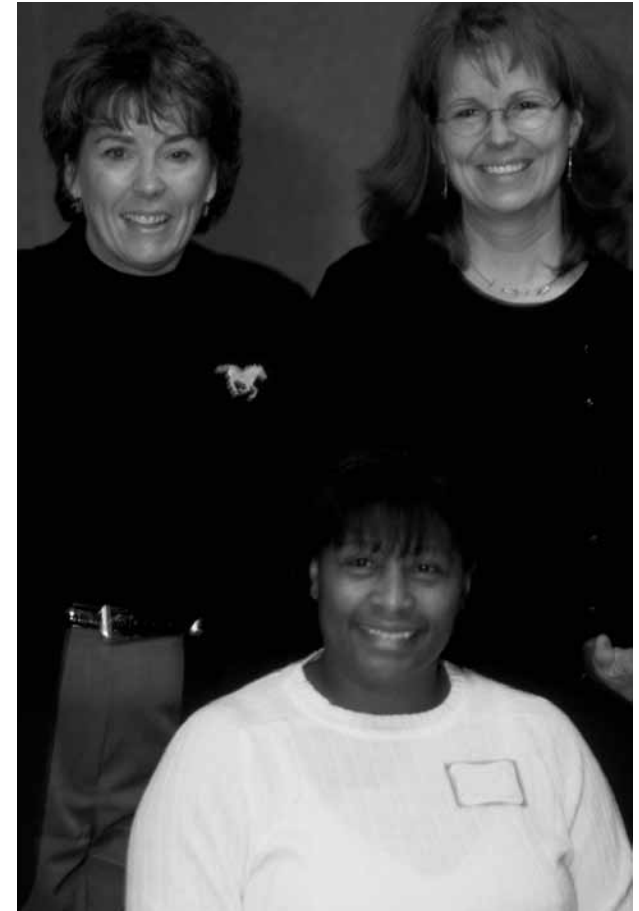
- Disciplined business conduct guidelines;
- Sexual harassment statement;
- Alcohol and other drug use;
- Zero tolerance of workplace violence.

These policies and guidelines are an approach to prevent problems. They are designed to assure that everyone associated with Partners can carry out their duties and responsibilities in a productive, efficient, and professional manner, and in a safe working environment. The guidelines help Partners staff in their day to day work and relationships with everyone involved. They can also be applied to Partners participants and speakers. The guidelines and policies should be sent to all Partners participants and speakers as part of their orientation.

DISCIPLINED BUSINESS CONDUCT GUIDELINES

- I. We will respect our own time and the time of others by:
 - A. Respecting each individual - Participants are expected to listen to others as they are talking and respect the privacy of each participant who shares a personal story. What is discussed and shared during each session should stay in the room and not be discussed outside of sessions.
 - B. Attending every Partners session - Mandatory attendance is required. The success of the program depends upon full participation of Partners and speakers.
 - C. Being punctual - Agendas are set to give speakers adequate time to cover each topic and participants adequate time to discuss issues, and develop and practice critical leadership skills. Please be on time for all sessions and after breaks.
 - D. Being prepared for each weekend session - Participants are expected to complete and submit homework assignments, bring materials or personal devices for recording, and think in advance about each topic and how it relates to their lives.

- E. Setting deadlines for completing outside assignments - Participants should develop a schedule for completing and submitting homework assignments for each session, and selecting a major project and completing the project. Participants should adhere to that schedule.
- F. Suggesting solutions rather than only identifying problems as issues are discussed - Participants are expected to learn and practice problem-solving skills. Participants, however, are not licensed counselors and outside counseling should be sought when needed to address personal issues.
- G. Paying attention to details - This program has multiple details that require attention, including evaluation forms and participant match. Please complete and submit forms as needed.



II. We will use our limited resources wisely by:

- A. Monitoring and controlling our expenses for the program and participants - Whenever possible and feasible, we expect that reasonable judgment is used to obtain the best travel arrangements, including air fares and hotel accommodations.
- B. Sharing information with others when you return home by sharing resources and links.
- C. Tracking time - By people involved in carrying out the program to assure the prudent use of available dollars for a quality Partners replication.
- D. Asking questions - Challenging old ways of thinking and doing things.
- E. Measuring our performance - Use session evaluations, surveys, and any other data to determine if participants are achieving the competencies.
- F. Joining organizations and staying connected - Serve on boards, task forces, commissions, etc. Practice leadership skills and share information and expertise with others.
- G. Send thank-you notes and recognize the efforts that each person makes to assure that Partners is a successful experience for everyone.

III. We will be responsive by:

- A. Answering every letter and returning every phone call - Promptly, professionally, and courteously.
- B. Setting and meeting deadlines - Renegotiating prior to missing deadlines.
- C. Listening carefully to others - Refraining from talking while others are speaking; taking care of personal business during break times.



SEXUAL HARASSMENT STATEMENT

Verbal, physical, and sexual harassment are prohibited. Harassment is any behavior which is not welcome, is personally offensive, may affect morale and interfere with an individual's ability to perform job duties and responsibilities in a work environment or fully participate in an educational/training environment. When the basis of harassment is race, color, religion, sex, disability or national origin, it is illegal.

Sexual harassment may include such actions as:

- Sex-oriented verbal kidding, or abuse;
- Subtle or overt pressure for sexual activity;
- Physical contacts such as patting, pinching, or constant brushing against another individual's body;
- Demands for sexual favors which affect an individual's employment status or consideration.

The prohibition regarding sexual harassment includes petty and annoying acts which create a negative work or learning environment. In the interest of maintaining a productive and positive working or learning environment, early and firm correction will occur.

Steps to take if/when harassment occurs:

- The individual affected should express concern about the harassment to the person causing the harassment that the behavior is objectionable and ask that it cease;
- Report harassment to a supervisor (in a workplace environment) or person responsible for conducting/overseeing a training/education program (outside of the workplace environment).

STATEMENT ON ALCOHOL AND OTHER DRUG USE

The State of Minnesota recognizes that alcoholism and other drug dependencies are a significant social problem, and that it has a responsibility to maintain a drug-free workplace. The State's policy on alcohol and other drug use applies to all Executive Branch employees and each State agency is required to enforce that policy.

The following prohibitions are included under the State's policy:

- No employee shall report to work under the influence of alcohol, marijuana, controlled substances, or other drugs which affect his/her alertness,

- coordination, reaction, response, judgment, decision-making or safety;
- No employee shall unlawfully manufacture, distribute, dispense, possess, transfer, or use a controlled substance in the workplace or wherever the state's work is being performed.

ZERO TOLERANCE OF WORKPLACE VIOLENCE

The State of Minnesota has adopted a policy of zero tolerance of violence because it believes that every person in the state has a right to live free from violence.

To further this policy, each agency of state government is required to adopt a goal of zero tolerance of violence in, and around, the workplace.

State employees are expected to promote positive behavior and treat employees with the respect and dignity that each person deserves. Emphasis is placed on creating a workplace where established standards of conduct are clear, communicated, consistently enforced, and where discipline is used fairly and appropriately to deal with instances of unacceptable behavior. These efforts help to create a low risk work environment that positively affects the attitudes and behavior of employees and our customers.



**Minnesota Governor's Council
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