"Only in community can we discover the best
course of action, claim our power, and act in unity."
~ Margo Adair and Sharon Howell

BAD-L

Building Alliances for Disability Leadership Curriculum

Version 2.5

Building Alliances for Disability Leadership * www.copower.org/fact/index.html * 1-800-760-4600
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Forward

Behind the BAD-L Adventure

Building Alliances for Disability Leadership (BAD-L) evolved as experts from two sectors, academia and community practice, found each other and some money to play. Pennie Foster-Fishman, Ph.D. is a professor in the Department of Psychology at Michigan State University. While working with Michigan's Statewide Independent Living Center (SILC) she confirmed her impression of an emerging crisis of leadership within the disability community. A class was offered by MSU where students conducted a qualitative research study to assist the SILC in understanding how existing leaders for the disabilities community became effective and successful leaders. Through 21 in-depth interviews with identified leaders, findings from this study highlighted the importance of three main components that supported their development: Mentoring, Networking, and Action- Learning.

Following this study, a series of community meeting discussions with several disability leaders and organizations in the state were held to discuss the findings and consider the next course of action. It was decided that a leadership training be developed that encompassed the main components of the study's findings.

Michigan Disability Rights Coalition (MDRC) is a small non-profit agency in Lansing Michigan that works at the policy level and organizes people with disabilities to participate in public discourse that affects their civil rights and the public service & supports their lives depend on. MDRC has a leadership development program, Center for Community Leadership (CCL) funded by the Michigan Developmental Disabilities Council. Staff in that program has over 20 years of practice supporting people with disabilities to assume leadership positions specifically in the disability rights movement. At the above mentioned community meetings Dr. Fishman met MDRCs Carolyn Lejuste and Melinda Haus-Johnson who were interested in expanding the CCL leadership program to include direct training of new leaders with disabilities. From this partnership BAD-L emerged.

Michigan State Universities Families and Communities Together Coalition (FACT) a competitive grant program designed to increase MSU's competitive stance for federal research funding that addresses issues related to the health and well-being of children, youth, families, and communities. The program supports multidisciplinary and collaborative research that links MSU with Michigan communities.

When MDRC joined SILC, Dr. Foster-Fishman sought a partnership with Dr. Tim Tansy and Dr. Chandra Donnell of the Rehabilitation and Disabilities Studies Program in the Department of Counseling, Educational Psychology, and Special Education. This collaboration fit the qualifications to apply for a FACT grant. Tiffeny Jimenez, Dr. Forster-Fishman's graduate student rounded out the team. The proposal to FACT was successful and BAD-L began.

Introduction

The BAD-L Vision
BAD-L fosters a connected group of people with disabilities who together lead in the creation of a completely inclusive society.

Who We Are
Six of us worked together to develop and deliver the BAD-L program and curriculum. Most of us had not known each other before we formed this partnership. Our own process informed the design of BAD-L as well as our professional and personal experiences. Although it would be impossible to share the deep and often frustrating discussions that framed the development of this project, our demographics may be of interest to you. We are young and old. We are five women and one man. Three of us work in academia, another is a graduate student. Two of us work in an NGO committed to disability rights. One of us is African-American. Five of us are white. One of us acquired a visible disability as a youth, another admitted to a hidden disability late in adulthood. Many of us are deeply committed to social justice.

What to Expect In this Curriculum
The BAD-L curriculum is written as a practical resource to guide others in delivering a year- long leadership development experience for emerging leaders. We emphasized system thinking and analysis in the experience as well as building relationship with each other and sharing wider network connections. As in similar start up initiatives our initial ideas and preparation did not always fit our practical experience. I say this as a caution; ambition in the planning process must be tempered with humility during the implementation phase. So you will occasionally find within each day's activities a section representing our team reflection on what happened and how we would change what we did.

We have attempted to arrange the curriculum into easily usable sections.

- In the Training section, you will find the agenda for the day followed by the activities and handouts you will use during the day.
- The Peer-to-Peer sessions are less structured. Sometimes they were used for formal teaching activities while other sessions were focused on participants developing relationships with each other. We have included the materials used in the more formal sessions. We encourage you to use the concept to adapt to the needs of your group.
- In Appendix 1 you will find the forms we used as we implemented the BAD-L curriculum. Some examples include evaluations, recruitment material, application forms, etc.
- Appendix 2 contains resources useful for facilitators to build their background knowledge.

- As we developed this curriculum, there were many excellent materials we wanted to use but could not fit into the schedule. Appendix 3 contains activities and binder resources we did not get to.

The BAD-L curriculum evolved from many discussions touching on our individual philosophy, values, experience in, and commitment to the disability rights activist community. There are six aspects of this curriculum we find especially compelling; facilitator role, power in relationships, our understanding of the emerging/seasoned leader relationship, interactive learning, model of leadership development, and proud and powerful.

Facilitator Role

Our planning conversations routinely returned to language and the ways in which the meaning of words influences behaviors and expectations. We specifically chose to refer to ourselves as facilitators rather than teachers or leaders. Recognizing a person can only empower themselves, we saw our role as creating experiences within an environment where people learned about and practiced leadership skills.
We integrated into the experiences opportunities for observation of themselves and others while we emphasized building skills in non-judgmental self reflection.

A good facilitator is able to hold the learning goals of the session, while staying attuned to what is happening in the moment. They have to balance the needs of the group with the needs of each individual. For every decision made by the facilitator to focus on one thing happening in the group, there is a decision not to focus on another. The facilitator is mindful of time while engaged in listening to the discussion and observing the engagement of the participants. A good facilitator must let go of expectations to respond to and move the group forward in their learning.

Action Learning

The participants in BAD-L, both seasoned and emerging leaders, are community people with a variety of experiences in formal schooling. Basic adult learning theory encourages practice of skills as a way to integrate a new way of knowing and doing into a habit. The BAD-L curriculum uses practice exercises during our day long workshops, formal follow-up discussion, practice at home, building relationships, verbal feedback, and informal meetings as ways to encourage habits that change a person's world view.
To assure success facilitators must discipline themselves to do their own self-reflection to measure how much their habits tend to "do for" rather than "offer others the opportunity to do for themselves."

Mentoring

Mentoring is a pairing of a person who has a specific skill with a person who wants to develop that skill. Mentoring is often used as a way to develop leadership. Within the disabilities movement, mentoring is important because of the complexity of social change and the fact that people with disabilities are often isolated within their community. Yet, it is absent in most disability leadership development efforts. BAD-L uses a formal mentoring program that links young adults with disabilities with an experienced change agent and leader (with or without a disability) in their community. Both the emerging and seasoned leader share a specific community concern, and make a commitment to work together during the year-long project. It is our intention to support the building of a life-long relationship between the mentoring pairs.

BAD-L‘s mentoring relationship is a working alliance with: a) mutually agreed upon goals and tasks, and b) creation of a trusting bond. We find the working alliance framework valuable because there are significant differences in power between the seasoned leaders who are community leaders, and young adults with disabilities who have emerged from a devalued (young people with disabilities) social group. Strong working alliances will produce positive outcomes for both mentors and protégés, including helping to build participatory skills such as increased self-efficacy and sense of empowerment.

Power in Relationships

The dilemma of a leadership development program is to offer information and learning experiences to support participant leadership development. It is easy for participants in any "development" program to defer to the expertise of the people who are facilitating the program. We wanted to design a program that would offer information and experiences toward learning leadership skills, to discourage participants from modeling themselves after a facilitator, rather to develop their own style of leadership. Each participant came to the program with their individual life experience that make them an expert by their own right. The BAD-L philosophy strives to invite emerging leaders into the circle as equals. The participants, both emerging and seasoned leaders and the facilitators all have things to learn from each other. The BAD-L curriculum encourages emerging leaders to work in community with their peers. Therefore it remains an important theme of BAD-L to work from a "power with," rather than a "power over" mindset.

Power of Language

As we worked to develop BAD-L we engaged in much conversation about traditional mentor/mentee models. We noticed, in our own team, dynamics that were unstated mentor/mentee relationships and we looked at those power dynamics. In the disability rights community the use of language is an important way to understand and resist societal oppression. We deliberately chose to call participants emerging leaders and seasoned leaders. This language honored the leadership each person has taken in their lives while honoring the reality that some participants had more specific experience than others. This language decision models our commitment to working in a "power with" frame.

Model of Leadership Development

The Lejuste Model of leadership development recognizes the challenge of encouraging leaders in a group of people whose live experience systematically excludes them from power. Systemized oppression of people with disabilities in the United States exists in education, employment, and a support and service system that removes them from general society. People with disabilities are forced into poverty to qualify for the health care they depend upon. More than many citizens they depend upon public transportation, public housing, and accessible physical access to community resources used by everyone.

The model (which can be found in Appendix 2) identifies three areas of emphasis for a leadership development program; self, community, and visionary. Because of the previously discussed oppression, a focus on increasing self-esteem, self-confidence, and self-awareness puts voice to the disability experience. Skills to build and maintain relationships are central to someone working with community volunteers. A leader who listens carefully to people and can articulate their needs will collect followers. The difference between a leader and an advocate is a collection of people willing to follow.

Proud and Powerful

The proud and powerful component of this curriculum directly addresses the issue of internalized oppression for people with disabilities. Every civil rights movement has addressed the issue of pride. Members of a targeted group, whether the target be race, sexual orientation, poverty, or in this case disability receive messages of worthlessness or "less than" from the dominate culture. The proud and powerful emphasis in this curriculum starts with disability history and culture and moves to the participants looking at each other to notice characteristics of themselves and each other that elicit pride. It takes systematic study of the ways oppression influences who we are to prepare leaders in an oppressed group to take pride and claim their place as full citizens.

Conclusion

We want you find this curriculum helpful to your development of emerging leaders. We hope it challenges you to experiment with the idea and add your own learning to this body of work. We imagine someday an interactive network of people interested in developing leaders who, as they become seasoned, remember to support those coming after.

BAD-L

First Training Session: Day One

- Overview of Project
- Systems Thinking: Part I
- Leadership Styles
- Leadership and Followership
- Proud and Powerful
- Community Norms and Expectations

"We cannot have healthy communities when everyone is preoccupied with narrow self-interest. We must recognize we are part of something larger than ourselves."
~ Bruce Adams

First Training Session: Day One

This is the first time the participants will meet each other and the project staff. It is extremely important to spend time getting to know one another, building relationships, and creating a sense of community amongst the participants.

Introductions

(25 minutes)

Staff Introductions

Project staff briefly introduce themselves.

Participant Introductions

Each participant introduces themselves to the group with the following:

- Their name
- One issue they are passionate about

Project Details

(30 minutes)

Provide participants with an overview of the project.

Overview of the Project

Vision is to foster a connected group of people with disabilities who together lead in the creation of a completely inclusive society. This will be accomplished by:

- Attending 5 day-long training sessions
- Attending peer-to-peer learning communities
- Establishing emerging/seasoned leader relationships
- Completing a community leadership project

The project is designed this way based on the results of interviews with grassroots and state-wide leaders with disabilities and focus group with young leaders and mentors. Informants stressed that they felt successful trainings are: 1) action-oriented, 2) mentor based, and 3) build relationships.

Distribute Participant Binders

Each participant should receive a binder filled with information that will be needed to complete the project. In addition, the binder may include resources, such as journal articles, websites, timelines, and much more (various materials for participant binders are included at the end of each section). It is suggested that the binder include the following information:

- Any handouts needed for the training
- Participant contact information
- Staff contact information
- Training dates with schedules (review with participants)
- Peer-to-Peer session dates (review with participants)
- Agenda for each training session
- Any relevant articles to read
- List of disability resources
- List of disability culture resources
- Significant dates in disability history

Journals

Pass out journals to participants and explain that they will be used throughout the project. Participants are required to journal about their experiences while at home in between sessions and will also provide them journaling time during training sessions.

If finances are an issue, you can require participants to purchase their own journal and bring it to all trainings. Depending on levels of ability and who is in the room, journaling can also be done by drawing, artwork, video tape, audio, typed on a computer, etc. – just to be sure to have materials for all modalities available.

Guiding Values

Facilitator(s) should explain the guiding values of the project.

- Respect
- Open to constant learning
- Critical awareness
- Mutuality/shared power
- Active learning
- Willingness to examine oneself

Explain that they can revisit these with their partner in day two.

Group Activity

Look around this group. Right now we are a group of individuals, many of us strangers to one another, who will, by the end of this leadership training be allies and activists together. We want to begin, today, by creating an environment where disability is not a defining characteristic but an interesting piece of information that might be necessary to building an inclusive community. So we are going to ask everyone to respond to a rather bold question about you.

Activity

As a large group, have each participant state their name and answer the question, "What do you want the group to know about you and/or your disability that is important to building relationships and community during this project?"

The intent is to get at any accommodations participants may request or any barriers that participants think will get in the way of building community. For example, one participant may have a strong cerebral palsy speech accent and other participants may have a hard time understanding. The group can discuss this and come up with a solution.

LINE SHARING ACTIVITY

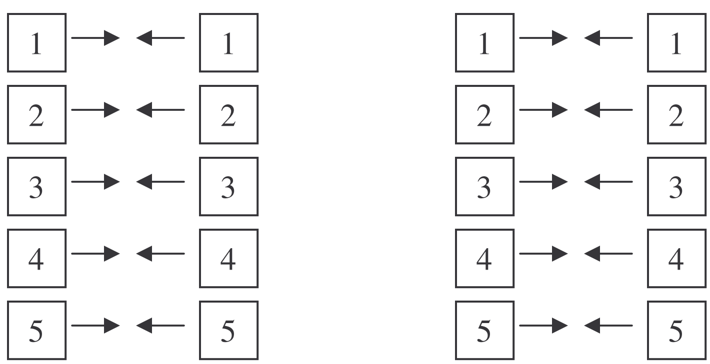
(60 minutes)

Source: Charlie Seashore from National Training Laboratory

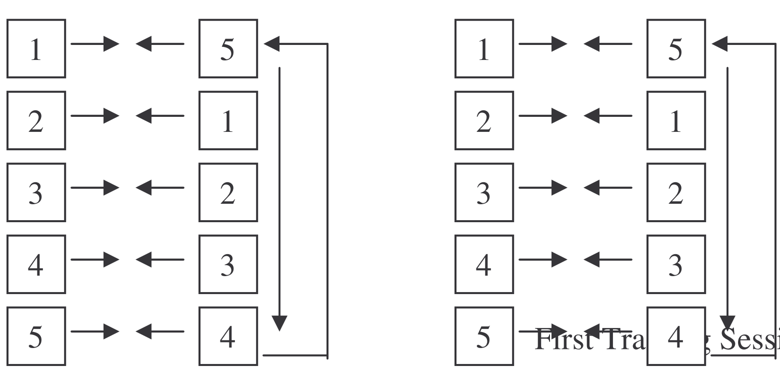
Purpose: A great way to get people talking comfortable to people they don't know and to allow everyone a chance to answer every question in a timely fashion.

Materials: Questions written or typed on small pieces of paper.

Directions: Divide participants into 4 even numbered groups (facilitators can take part to make the numbers even if necessary). Assign each person in the group a numbered question (give them a piece of paper with the question on it and tell them to hang onto it). Then have them get into 2 sets of 2 lines where each person is facing someone with the same numbered question.



Explain that the participant on one side will ask their question and the person across from them will have 3 minutes to answer. Then they will switch for another two minutes. Once each person asks their question and answers the other person's question, one row of participants will get up and move down one chair. Again, one side will ask their question and the person across from them will have 3 minutes to answer. Then they will switch for another two minutes. Once both participants ask and answer, one row of participants will move down one chair. This process repeats until each participant has answered paired up with everyone across from them and returns to the person they started with.



Ideas for questions:

- Why did you decide to participate in this project?
- What is one thing you would change in the world and why?
- Name someone you think is a leader and why.
- What do you think makes a mentor/mentee relationship work well?
- Name someone in your life that has been a mentor. What did you learn from them?

Once everyone has answered each question, ask them to get in groups based on the question they asked – so all people who asked question 1 would be in a group, question 2 in a group, etc. For 15 minutes, ask each group to discuss the responses they received and to identify patterns. What did people's comments have in common? What is something you heard that did not fit with other things you heard? What did you hear that surprised you? What is something that you expected to hear, but did not hear? Next, have each group report their themes to the larger group.

SYSTEMS THINKING: PART I

(60 minutes)

Source: The following three activities came from the Systems Playbook.

Activity # 1: Color, Furniture, Flower

Begin by asking participants to write on an index card or piece of paper the first word that comes to their minds when they hear the following words:

- Color
- Furniture
- Flower

Next, ask the group how may said "red" for the color. How many said "blue"?
For furniture: How many said "chair"? "couch"? For flower: How many said "rose"? "daisy"?

With uncanny consistency the majority of the group will have written down red, chair, and rose. (or one of the second choices). Ask the group why they think this happens.

Debrief: We sometimes call the neurological pathways in our brains ruts and grooves. The more we think in a particular way, the deeper the rut we create. When we unconsciously continue in the same thought patterns, these grooves deepen as we reinforce those patterns. The more the grooves deepen, the more things look to us as if they fit our groove. If someone thinks differently from us we can use this information to enhance or hinder our thinking and challenge our habitual patterns of thought.

When it comes to surfacing, testing and exploring our pictures and ideas we have (called mental models which will be explained after the activities) of how the world works, we can be each others' greatest asset. *Facilitator may want to tie this to leadership and change. Discuss with participants that as leaders, we can learn from others which affects the way we see the world working.*

As a large group, answer the following questions:
- Can we catch ourselves going "on automatic pilot"
- How can we encourage diverse perspectives in order to surface, test and explore our own mental models?

Activity #2 Everything But "Sleep"

On a flip chart, show (and read out loud) the following ten words:
- Slumber
- Dream
- Bed
- Quiet
- Nap
- Pillow
- Night
- Blanket
- Pajamas
- Snooze

Do not, as the facilitator, draw attention to the association with "sleep". Instruct the group to look at the words but not to write anything down for the moment. After ten seconds, take the flip chart down and ask the group to write down as many words as they can remember, without talking.

Ask participants to raise their hands if they wrote down the word "slumber". Then ask who wrote down the word "night". Then, "Okay who wrote down the word "sleep"? Note how many said they saw "sleep". After those people lower their hands, show the flip chart page again. You won't have to say much…those who thought they saw "sleep" will quickly see that it is not part of the list.

As a large group, discuss the following questions:
- What happened?
- How do we develop the observer in ourselves so we more often have our thoughts as opposed to being had by them?
- How do we, in real time, become aware of the associations we are making, and check for their correctness?

Activity # 3 Oak, Joke, Croak

At a fast pace, ask an individual or a small group the following questions (pause briefly to allow a response):
Q. What do we call the tree that grows from acorns?
Oak
Q. What do we call a funny story?
Joke
Q. What do we call the sound made by a frog?
Croak
Q. What do we call the white of an egg?
Yolk

Debrief: This is good for discussion mindlessness and the power of mindfulness to make our thinking more systematic.
What are the trip wires we need to lay in our brains so we more frequently are in the reflective mode?
How can we make our thinking habits more understandable?

Discussion: We take action from the way that we think. Too often we take action without really knowing our thinking process got us there. The ladder of inference can help us think (and talk) about why and how we form our opinions.

Mental Models

Mental models are the pictures, ideas, and stories that we carry in our minds. They can be about us, about other people, about the man made world we live in, about everything in the world. If it is true that no one human is perfect, so we can also say that everyone's personal mental model is flawed. It is this flaw that causes so many problems in the world.

Differences between mental models explain why two people can observe the same event and describe it differently; they are paying attention to different details. Mental models also shape how we act. For example, if we believe people are basically trustworthy, we may talk to people we first meet more freely than people who believe that you can't trust anyone.

Because we are not aware of our mental models, they are usually invisible to us. If we practice how to look for them, and make our discovery open to others, we will have better communication. Good communication is a sign of a good leader.

If time allows, give participants a few minutes to journal. Ask them to jot down things that they may have to work on to become aware of their own mental models.

Ladder of Inference

Refer participants to the Ladder of Inference section of their binders.

The Ladder of Inference is a picture of the way our thinking habits work. It is a way to discover and talk about our mental model.

In the large group review the steps of the Ladder of Inference. Use the second disability ladder as a real life example of the ladder in action. Elicit and respond to clarifying questions.

Summarize the information by making the points from "how we usually climb the Ladder of Inference" handout. Then ask participants for the consequences when we jump up the ladder. (Elicit responses until participants make the points listed in the "impact" section.) Finish by asking volunteers to read aloud the guidelines and suggest they practice using them throughout the BAD-L training series.

Hang a list of the guidelines on the wall throughout the series.

LEADERSHIP COMPASS ACTIVITY

(45 minutes)

Just as each of us learns in different ways, each of us can lead in different ways. As our world and communities have changed, what we have learned is that the old school style of top down leadership simply doesn't work in all situations. In many businesses, institutions, and communities, leadership has become more collaborative. To have an effective collaboration, you need to have people with a variety of skills. This variety creates the best whole.

Source: The Guide to Building Effective Participant Councils

Purpose: To help participants identify their leadership style and see what style of leadership their fellow communities members lean towards.

Materials: A copy of each direction to post on the wall, one copy of handouts for each participant, and plenty of room space to break into the four directions.

Directions: On four areas of your room, post the four directions – North, East, South, and West – you can copy the included examples at the end of this section. Provide each participant with the handouts that describe the work and the leadership traits of the four directions. Give them 5-10 minutes to reflect on the directions and then rank them, number 1 being most like them and number 4 being least like them. Once they have completed that step, have them go to whichever direction they think their number one is. In those groups, give them 5-10 minutes discuss why they felt they were a good match for this direction. Have them identify common strengths and weaknesses of their direction. Staying in their group, ask for volunteers to share some of what was discussed or insights that people gained. Now ask the participants to go to the direction they ranked as their number four, the least like them. Again, give them 5-10 them discuss why they felt they were NOT a good match for this direction and identify common strengths and weaknesses of this direction. Then ask for volunteers to share some of what was discussed or insights that they gained.

Come back as a large group and provide participants with the following handouts (see activities section): "Pitfalls When Styles Are Taken to Excess" and "Suggestions on Working with a…"

As a large group, discuss the following questions for 5-10 minutes:

- Is it better to have a group of the same leadership styles or with different leadership styles? Why?
- How does your leadership style help or hinder a mentor/mentee relationship?

Reflection

Good leaders have qualities from all four directions and know when and how to pull out the different areas. Give participants a few minutes to journal responding to, "Which leadership direction would you want to draw more upon in yourself?"

LEADERSHIP AND FOLLOWERSHIP

(60 minutes)

Facilitator(s) should have read the following articles prior to this session (can be found in Appendix 2):

- *Lejuste's Three Dimensions of Leadership Explained*
- *In Praise of Followers*

What is Leadership and Followership

Begin by presenting the slide show "Lejuste's Three Dimensions of Leadership" (can be found in Appendix 2).

Have participants independently review the model comparison chart located in their binders and circle where they are in their own leadership development/style.

Interplay of Style on Followers and Leaders Activity

Refer participants to their binders for this activity.

In a large group, review the following handouts:

- Control Model of Leadership
- Giving up Control Model of Leadership
- Effective Followers Matrix

Next, have the participants get into pairs and share with each other a personal story of being a follower. Have them answer the following questions: How would you describe yourself on the Follower chart and what kind of leader were you reporting to? What is the relationship between styles of leadership and styles of followership? What does all of this tell you about the kind of leader you want to become? Knowing all of this, going back to your story, what would you do anything differently? Come back to a large group and report back on the findings of the pairs.

PROUD AND POWERFUL

(45 minutes)

People with disabilities often struggle to feel proud of themselves and know that they can make a different. Connections for Community Leadership coined the phrase Proud and Powerful and have developed several activities to help people with disabilities gain a sense of pride and power. Each training session with have time set aside for activities and discussions regarding this concept.

Disability Pride

As a large group, discuss the concept of disability pride with the participants. Connections for Community Leadership's definition reads, "Accepting and honoring our uniqueness and seeing it as a natural and beautiful part of human diversity. Pride comes from celebrating our own heritage, culture, unique experiences and contributions" and includes the following bullet points:

- Disability pride recognizes the power we have to make change.
- Disability pride results when we challenge and ultimately undo the negative beliefs, attitudes, and feelings and systematic oppression that come from the dominate groups' thinking that there is something wrong with our identity or our disabilities.
- Disability pride rejects shame and the need to "blend in."
- Disability pride is self acceptance and validation of our uniqueness.
- Disability pride results in making choices based on the respect for interdependence, accommodations, and creativity.
- Disability pride is the feeling of strong connection with a community of other people.
- Disability pride recognizes that it is our uniqueness that will transform all people and institutions (society).

Self-Empowerment (Powerful)

The word "power" is usually expressed in negative terms; it's seen as having control over someone else. There's the idea that "good" people stay away from power. However, the word "power" actually comes from the Latin word "posse" which means "to be able." The focus here is on our own power to make positive choices and changes in our lives AND our power as a community by influencing others and making significant change for more than ourselves.

The word "empower" means to give power to someone else. This infers that there is a power dynamic – that one has more than the other and will give up some power for the "lesser" person.

Connections for Community Leadership decided to use the word "self-empowerment" to describe what it means to be powerful. This eliminates the hierarchy that someone else is giving us power. CCL's definition of self-empowerment reads, "Knowing and feeling one's pride and applying our unique voice, skills, and actions with energy and confidence to achieve a vision (of full citizenship in all places: personal relationships, home, school, work, community, institutions, etc.)" and includes the following bullet points:

- Includes the commitment to provide personal and institutional support for people with disabilities who are seeking to claim their full and rightful place, power, and pride.
- Knowing, practicing, and using the skills to make changes.
- Is expressed when disability communities protest discrimination and celebrate disability culture, heritage, and history.

As a large group, identify some examples of the use of power to accomplish something in the community such as a group that managed to get wheelchair lifts installed on the buses of their local transportation system.

Disability History Activity

Key to becoming proud and powerful is understanding the history of oppression of people with disabilities and knowing that there is also a history of resistance by people with disabilities.

Source: Adapted from Melanie Morrison's Doing Our Own Work curriculum.

Purpose: To expose participants to the long history of oppression and discrimination that our community has faced and continues to face. In addition, participants will learn that our ancestors have been fighting and resisting oppression for just as long.

Materials: A large timeline to place on the wall, a list of significant dates in history when people with disabilities have been oppressed, a list of significant dates in history when people with disabilities have resisted oppression, tape, markers, small pieces of paper.

Directions: Cut apart paper and write/type acts of oppression on them. Keep them in order by date. You will want enough pieces/dates so that each participants has at least 2 dates to read. Do the same with acts of resistance. (See materials at the end of this section for a list of significant dates.) Next, tape up a large timeline to the wall with a date range that covers the dates you have selected to use. On the left hand side near the top, write the word "Oppression". On the left hand side near the bottom, write the work "Resistance." Have participants sit in a close circle. The facilitator should explain that this can be a very emotional and intense experience and that the activity is to be done in silence. Next, pass out the sheets of paper with the dates in history when people with disabilities have been oppressed (be sure to keep them in order as you pass them around the circle). Explain that each person will read their dates one at a time going around the circle until all dates have been read. After each person reads their date, they are to tape it to the top section of the large timeline on the wall and return to their seat. Once all dates have been read and taped to the timeline, as a large group, spend 5-10 minutes discussing how it feels to hear and see the history of oppression of our brothers and sisters. After the discussion is over, pass out the sheets of paper with dates of important acts of resistance (be sure to keep them in order as you pass them around the circle). Go around the circle and have each participant read their dates of resistance and tap them to the bottom section of the large timeline on the wall. Once all dates have been read and taped to the timeline, as a large group, spend 5-10 minutes discussing how it feels to hear and see the acts of resistance throughout history. After this discussion, ask each person to go and write their name and the date they started their disability leadership journey on the resistance section of the large timeline on the wall.

COMMUNITY NORMS/EXPECTATIONS

(20 minutes)

Community Norms

Community norms (often called guidelines or rules) are important to building a sense of community. In addition, they help build trust and a sense of safety in a larger group. It is suggested to avoid the word "rules" when developing community norms because "rules" often involve the decision/rule being made by someone with more power. We call them community norms, because these are the acceptable and encouraged behaviors that the community is deciding upon.

It is extremely important that the participants are the ones who set the community norms and hold each other accountable throughout the project. Facilitators can suggest additions to their norms, but ultimately it should be the participants' choice whether or not to take the suggestion.

Here are a few suggested guidelines:

- Step Up/Step Back – Those who talk a lot and tend to dominate the discussion should challenge themselves to step back and give time for other voices. Those who find it easy to remain quiet and blend in with the background should challenge themselves to step up and contribute to the conversation.
- Willingness to Challenge Others and Be Challenged Yourself – We are all human will say and do something that hurts or offends someone throughout the project. This guideline asks participants to "call each other out" when something offensive is said or done. In addition, the person being called out should challenge themselves to listen and consider what people are saying instead of the immediate defensive response and back peddling.
- Make Your Needs Known – If you need additional accommodations, more information, to have something repeated, to take a break, etc., let the group know. Needs cannot be met if they are not known.
- Let Us Be the Timekeepers – We will worry about breaks, if we are going over, how much time is left, etc. We want you to concentrate on the content and getting the most you can out of the sessions.

Ask the participants to create their own community guidelines for the project. Have a participant write the guidelines on a blackboard, overhead, or a large piece of paper (somewhere where they can be visible at all times). This participant (or another participant) should facilitate the discussion. Facilitators shall remain as removed as possible – only giving suggestions if needed or prompted. Once the guidelines are complete, explain that they can add to this list throughout their time in the project.

An option is to type up the guidelines and give each participant two copies on day 2 of the first training. Have participants sign one copy and turn it in – keeping the other copy for themselves. This can help participants feel like they should respect the guidelines and give tangible evidence that will help them hold each other accountable. For example, at the third training session, a Sally breaks the guidelines. Sam then says, "Remember our guidelines and you agreed to them when you signed your name on day 1."

Expectations

This is what is expected of the participants regarding their time in the project and the project itself. These can come from facilitators and the community. Some expectations that should be included are:

- Attend all training sessions
- Attend all peer-to-peer sessions
- Complete a community leadership project
- Participate in the research aspect of the program (voluntary, but strongly encouraged)
- Have ongoing and frequent communication with emerging/seasoned leader
- To come to each training session prepared/with completed assignments (if any)
- To notify facilitators and emerging/seasoned leader if unable to attend a session
- A personal commitment to complete all 18 months of the project

It is important to note that when working with people with disabilities, there are several barriers to attendance and other aspects of the program (health issues, lack of transportation, PA assistance, etc.). Some participants with disabilities may agree to the expectation of attending all trainings and peer-to-peer learning sessions, but then might develop a health issue relating to their disability that results in missing one session. As a facilitator, be prepared for participants to miss sessions on occasions.

In addition, it should be decided how many absences are allowed before the stipends and honorariums begin to decrease in value. This decision can be make by the participants as they discuss expectations.

WRAP UP AND QUESTIONS

(10 minutes)

Summarize what participants learned today and key themes that emerged. Spend time answering questions the participants may have.

Remind them of the next training date, location, time, and anything they need to do between the sessions.

Homework:
Give everyone an envelope with their name on it. The envelope given to seasoned leaders should include a piece of paper stating, "You will have an opportunity tomorrow to tell people what kind of mentor you are so be thinking about it." The envelope given to emerging leaders should include a piece of paper stating, "You will be given a chance to interview mentors tomorrow. Please come with questions you want to ask and/or a list of qualities, values, etc. you think are important in a mentor."

First Training Session Day One Activities and Binder Materials

- **Activities**
  - Line Sharing
  - Systems Thinking
  - Leadership Compass
  - Disability History
- **Binder Materials**
  - Disability Resources
  - Disability Culture Resources
  - Community Norms and Expectations
  - Ladder of Inference
  - Model Comparison Chart
  - Control Model of Leadership
  - Giving Up Control Model of Leadership
  - Effective Followers Matrix
  - Proud and Powerful Definitions
  - Significant Dates in Disability History

"A great leader's courage to fulfill his vision comes from passion, not position."
~John Maxwell

DISABILITY RESOURCES

Readings:

Brown, S (2003) Movie Stars and Sensuous Scars: Essays on the Journey From Disability Shame to Disability Pride. People with Disabilities Press.

Charlton, J. (1998) Nothing About Us Without Us: Disability Oppression and Empowerment. University of California Press.

Hartling, L., Rosen, W. Walker, M. Jordan, J. (2000) Shame and Humiliation: From Isolation to Relational Transformation. Stone Center Work in Progress No. 88.

Jordan, J., Kaplan, A. Miller, J.B., Stiver, I. Surrey, J. (1991) Women's Growth in Connection: Writings From the Stone Center. Guilford Press.

Jordan, J. Ed (1997) Woman's Growth in Diversity: More Writings from the Stone Center. Guilford Press.

Longmore, P. (2003) Why I Burned My Book and Other Essays on Disability. Temple Press.

Panzarino, C. (1994) The Me In The Mirror. Seattle: Seal Press.

Saxton, M. and Howe, F. (Eds) (1987) With Wings: An Anthology of Literature By and About Women with Disabilities. New York: The Feminist Press.

Shapiro, J. No Pity: People with Disabilities Forging a New Civil Rights Movement

Swain, J. (2003) Controversial Issues in a Disabling Society (Disability Human Rights and Society) Open Univ Press; (March 2003)

DISABILITY RESOURCES

Service Animal Resources
Canine Companions for Independence - http://www.caninecompanions.org/
Paws with a Cause - http://www.pawswithacause.org/
Service Dog Information - http://sdog.danawheels.net/

Legislation Resources
Americans with Disabilities Act - http://www.usdoj.gov/crt/ada/adahom1.htm
Section 504 of Rehabilitation Act - http://www.hhs.gov/ocr/civilrights/resources/factsheets/504.pdf
Air Carrier Access Act - http://www.disabilitytravel.com/airlines/air_carrier_act.htm

Disability Organization Resources:
ADAPT - http://www.adapt.org/
National Organization on Disabilities – http://www.nod.org
American Association of People with Disabilities - http://www.aapd-dc.org
National Consortium on Leadership and Disability for Youth - http://www.ncld-youth.info/index.htm
Women with Disabilities Australia – http://www.wwda.org.au
World Institute on Disability - http://www.wid.org/
Disabled Women – http://www.disabledwomen.net
Disability Rights and Education Fund - http://www.dredf.org
Think College – http://www.thinkcollege.net
Disability World - http://www.disabilityworld.org
Mind Freedom - http://www.mindfreedom.org
Disability.gov - http://www.disability.gov/

Disability Publication Resources
The Ragged Edge - http://www.ragged-edge-mag.com
Mouth - http://www.mouthmag.com/
New Mobility - http://www.newmobility.com
Sports and Spokes - http://www.pvamagazines.com/sns/

Disability Culture Resources
Proud and Powerful – http://www.copower.org/leader/pandp.htm
Disabled and Proud – http://www.disabledandproud.com
Disability Pride Parade - http://www.disabilityprideparade.com/
Institute on Disability Culture - http://www.dimenet.com/disculture/
VSA Arts - http://www.vsarts.org/
Crip Commentary – http://www.cripcommentary.com
Deaf Queer Resource Center – http://www.deafqueer.org
A Journal of Disability Culture and Literature - http://www.abilitymaine.org/breath
Proud to be Disabled - http://www.proudtobedisabled.com/

DISABILITY CULTURE RESOURCES

Articles About Disability Culture

Finkelstein, Vic, "Disabled People and our Culture Development." DAIL (DISABILITY ART IN LONDON) MAGAZINE ANTHOLOGY: THE FIRST FIVE YEARS (London: DAIL Magazine, 1992), 3-6. http://www.independentliving.org/docs3/finkelstein87a.pdf

Finkelstein, exiled from South Africa in 1968, journeyed to England where he became a psychologist, retired tutor in Disability Studies at the Open University, UK and Visiting Senior Research Fellow, Centre for Disability Studies, Leeds University, opened the 1987 London Disability Arts Forum with a brief speech on why disability culture is a crucial component of the disability rights movement.

Finkelstein, Vic, A PERSONAL JOURNEY INTO DISABILITY POLITICS, First presented at Leeds University Centre for Disability Studies, 7th February 2001. http://www.independentliving.org/docs3/finkelstein01a.pdf

Finkelstein, exiled from South Africa in 1968, journeyed to England where he became a psychologist, retired tutor in Disability Studies at the Open University, UK and Visiting Senior Research Fellow, Centre for Disability Studies, Leeds University, reviews the development of radical British disability organizations and his own personal history in their evolution and in that of his own thinking.

Gill, Carol J., "A Psychological View of Disability Culture," DISABILITY STUDIES QUARTERLY 15 (4), (Fall 1995), 16-19. http://www.independentliving.org/docs3/gill1995.html

Gill, Assistant Professor of Human Development and Director of the Chicago Center for Disability Research, University of Illinois, and foremost proponent of disability culture in the 1980s provides an excellent perspective of why the need for a culture, what it is, and what it means for those of us who feel the need to be categorized in it.

Longmore, Paul K., "The Second Phase: From Disability Rights to Disability Culture," DISABILITY RAG & RESOURCE, 16 (5), (Sept./Oct. 1995), 4-11. http://www.independentliving.org/docs3/longm95.html

Longmore, Professor of History and Director of the Institute on Disability, San Francisco State University, described how the American disability rights movement moved in the mid-1990s from a focus on rights to a quest for collective identity.

Morrison, Elspeth and Vic Finkelstein. 1993. Broken Arts And Cultural Repair: The Role Of Culture In The Empowerment Of Disabled People, First published in Swain, J., Finkelstein, V., French, S., and Oliver, M., DISABLING BARRIERS - ENABLING ENVIRONMENTS, (London, Sage Publications, in association with the Open University, 1993). http://www.independentliving.org/docs3/finkelstein93a.html

Morrison, former editor of Disability Arts in London magazine, freelance writer and theatre director, and author of the Independent Theatre Council's book on Theatre Practice and Disability and Finkelstein, exiled from South Africa in 1968, journeyed to England where he became a psychologist, retired tutor in Disability Studies at the Open University, UK and Visiting Senior Research Fellow, Centre for Disability Studies, Leeds University, discuss how human beings come together in groups to confirm their identity and how disability arts and culture enable people with disabilities find their way in mainstream culture.

Oliver, Michael J. 1999. "Capitalism, disability and ideology: A materialist critique of the Normalization principle." First published in Flynn, Robert J. and Raymond A. Lemay, A QUARTER-CENTURY OF NORMALIZATION AND SOCIAL ROLE VALORIZATION: EVOLUTION AND IMPACT, Ottawa: University of Ottawa Press, 1999). http://www.independentliving.org/docs3/oliver99.pdf

Oliver, Professor of Disability Studies, University of Greenwich, London, England, and well-known disability rights advocate, sociologist, and author of many titles, including UNDERSTANDING DISABILITY: FROM THEORY TO PRACTICE, argues that the oppression that disabled people face is rooted in the economic and social structures of capitalism and that materialist social theory offers disabled people the opportunity to transform their own lives and in so doing to transform the society in which they live into one in which all roles are valued.

Pfeiffer, David, "The Disability Movement and its History. First published as "Hip Crip 101," MAINSTREAM: MAGAZINE OF THE ABLE-DISABLED, 19, 4 (Dec-Jan 1994-95), 32-37. http://www.independentliving.org/docs3/pfeiffer95.html

Pfeiffer, Center on Disability Studies, University of Hawaii, past president of the Society for Disability Studies, present editor of Disability Studies Quarterly and an early leader of the U.S. disability rights movement while a full time faculty member at Suffolk University in Boston, explores the history of the American disability rights movements through what he considers some of its most classic texts.

Creating a Disability Mythology. INTERNATIONAL JOURNAL OF REHABILITATION RESEARCH, 15, (Winter 1992), 227-33. http://www.independentliving.org/docs3/brown92a.html

An attempt to reframe how people look at disability from a perception of pride rather than negativity. With a focus on a few heroes the author describes a mythic journey of the disability experience.

Brown, Steven E., "Deviants, Invalids, and Anthropologists: Cross-Cultural Perspectives on Conditions of Disability in One Academic Discipline: A Review of Disability and Culture, DISABILITY AND REHABILITATION: AN INTERNATIONAL, MULTIDISCIPLINARY JOURNAL, 18 (5) (May 1996), 273-75. http://www.independentliving.org/docs3/brown96d.html

A critical review of the book DISABILITY AND CULTURE, edited by Benedicte Ingstad and Susan Reynolds Whyte.

Brown, Steven E., "Disability Culture: A Fact Sheet," (Las Cruces, NM: Institute on Disability Culture, 1996). http://www.independentliving.org/docs3/brown96a.html

A two-page description of the evolution of disability culture through the mid- 1990s.

Brown, Steven E., "Dis-ing Definitions," MAINSTREAM: MAGAZINE OF THE ABLE-DISABLED, 21 (10), (Aug. 1997), 22, 26-27, 29.
http://www.independentliving.org/docs3/brown97b.html

An attempt to reframe what the language about disability means and how people with disabilities do or do not fit into the "norm."

Brown, Steven E., "'Poster Kids No More:' Perspectives About the No-Longer Emerging (In Fact, Vibrant) Disability Culture,"; DISABILITY STUDIES QUARTERLY, 18(1) (Winter 1998), 5-19. http://www.independentliving.org/docs3/brown98a.pdf

This article attempts of put into perspective the author's view of changes in the ideas and implementation of the disability culture concept. Includes many quotes from previous writings.

Brown, Steven E., "We Are Who We Are... So Who Are We? MAINSTREAM: MAGAZINE OF THE ABLE-DISABLED, 20 (10), (Aug. 1996), 28-30, 32.
http://www.independentliving.org/docs3/brown96b.html

After years of being asked for a short definition of "disability culture" this article attempts a one-paragraph definition and discusses the treacherous nature of definitions in general.

Song Lyrics

Crescendo, Johnny. "The Ballad of Josie Evans." 1993. [Recorded by Johnny Crescendo and the P.O.P. Squad] On PRIDE [Cassette] Derbyshire, England, 1993.
http://www.independentliving.org/docs3/evans93.html

An eloquent, heart-wrenching story of a woman who is abandoned by her government and everyone else to a solitary, but dignified, life and death in a nursing home.

Field, Jane, "The Fishing is Free," THE FISHING IS FREE. (Available while supplies last from the Institute on Disability Culture, 2260 Sunrise Point Rd., Las Cruces, NM 88011, $10.00 plus S&H). http://www.independentliving.org/docs3/field1994.html

Field, a Canadian singer and songwriter with a disability is the only singer I know of who consistently uses humor in her tales of disability.

Books About Disability Culture

Brown, Steven E., FREEDOM OF MOVEMENT: INDEPENDENT LIVING HISTORY AND PHILOSOPHY (Houston: ILRU, 2000; Available from 2323 S. Shepherd, Suite 1000, Houston, TX 77019, http://www.ilru.org).

Brown, Steven E., INVESTIGATING A CULTURE OF DISABILITY: FINAL REPORT (Las Cruces, NM: Institute on Disability Culture, 1994).

Charlton, James I., NOTHING ABOUT US WITHOUT US: DISABILITY OPPRESSION AND EMPOWERMENT (Berkeley: California, 1998).

Crutchfield, Susan and Marcy Epstein, eds., POINTS OF CONTACT: DISABILITY, ART, AND CULTURE (Ann Arbor: University of Michigan, 2000).

Fries, Kenny, STARING BACK: THE DISABILITY EXPERIENCE FROM THE INSIDE OUT (NY: Plume, 1997).

Gallagher, Hugh Gregory, BY TRUST BETRAYED: PATIENTS, PHYSICIANS AND THE LICENSE TO KILL IN THE THIRD REICH (New York: Henry Holt, 1990).

Gallagher, Hugh Gregory, FDR'S SPLENDID DECEPTION (New York: Dodd, Mead, 1985).

Hevey, David, THE CREATURES TIME FORGOT: PHOTOGRAPHY AND DISABILITY IMAGERY (London: Routledge, 1992).

Jacobson, Denise Sherer, THE QUESTION OF DAVID: A DISABLED MOTHER'S JOURNEY THROUGH ADOPTION, FAMILY, AND LIFE (Available from Creative Arts Book Company, 833 Bancroft Way, Berkeley, CA 94710, 1999, $24.50).

Kailes, June Isaacson, DISABILITY PRIDE: THE INTERRELATIONSHIP OF SELF-WORTH, SELF-EMPOWERMENT, & DISABILITY CULTURE (Houston: Independent Living Research Utilization, 1993).

Keith, Lois, ed., "WHAT HAPPENED TO YOU?" WRITING BY DISABLED WOMEN (New York: New Press, 1994).

Linton, Simi, CLAIMING DISABILITY: KNOWLEDGE AND IDENTITY (NY: New York University, 1998).

Longmore, Paul K. and Lauri Umansky, eds., THE NEW DISABILITY HISTORY: AMERICAN PERSPECTIVES (New York: NYU Press, 2001).

Mairs, Nancy, WAIST-HIGH IN THE WORLD: A LIFE AMONG THE NONDISABLED (Boston: Beacon, 1996).

Websites About Disability Culture

Centre for Disability Studies: University of Leeds
http://www.leeds.ac.uk/disability-studies

Crip Commentary
http://www.cripcommentary.com

Deaf Queer Resource Center
http://www.deafqueer.org

Disability Beat Radio
http://www.disabilitybeat.com/index.html

Disability Pride Parade
http://www.disabilityprideparade.com/

Disability Studies Quarterly
http://www.cds.hawaii.edu

Disability World Ezine
http://www.disabilityworld.org

Disabled and Proud
http://www.disabledandproud.com

Institute on Disability Culture
http://www.dimenet.com/disculture/ (text)
http://hometown.aol.com/sbrown8912/index.html (graphics)

Johnny Crescendo
http://206.244.52.52/

London Disability Arts Forum
http://www.dail.dircon.co.uk/

Mobility International
http://www.miusa.org

National Disability Arts Forum (UK)
http://ndaf.org/

Proud and Powerful
http://www.copower.org/leader/pandp.htm

Proud to be Disabled
http://www.proudtobedisabled.com/

Vsa Arts
http://www.vsaarts.org/

LINE SHARING ACTIVITY

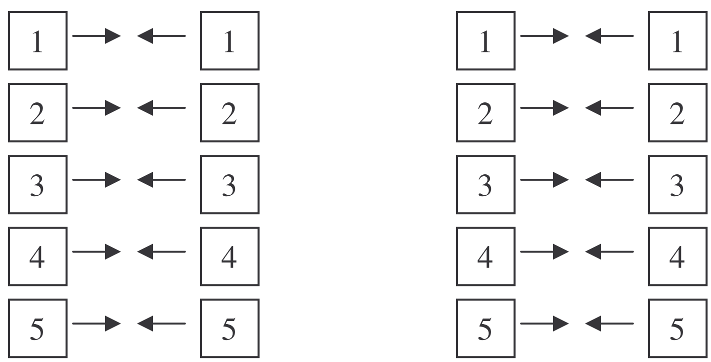
Source: Charlie Seashore, NTL

Purpose: A great way to get people talking comfortable to people they don't know and to allow everyone a chance to answer every question in a timely fashion.

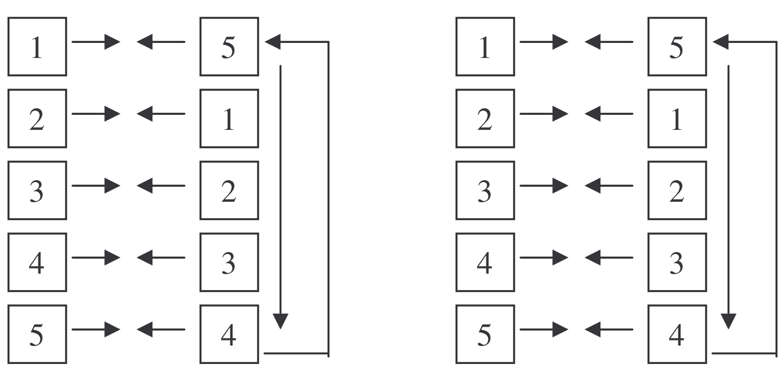
Directions: Divide participants into 4 even numbered groups (facilitators can take part to make the numbers even if necessary). Assign each person in the group a numbered question (give them a piece of paper with the question on it and tell them to hang onto it). Then have them get into 2 sets of 2 lines where each person is facing someone with the same numbered question.

Materials

- ✓ Questions written on small pieces of paper



Explain that the participant on one side will ask their question and the person across from them will have 2 minutes to answer. Then they will switch for another two minutes. Once each person asks their question and answers the other person's question, one row of participants will get up and move down one chair. Again, one side will ask their question and the person across from them will have 2 minutes to answer. Then they will switch for another two minutes. Once both participants ask and answer, one row of participants will move down one chair. This process repeats until each participant has answered paired up with everyone across from them and returns to the person they started with.



Ideas for questions:

- Describe your leadership style.
- What is one thing you would change in the world and why?
- Name someone you think is a leader and why.
- What do you think makes a mentor/mentee relationship work well?
- Name someone in your life that has been a mentor. What did you learn from them?

Once everyone has answered each questions, ask them to get in groups based on the question they asked – so all people who asked question 1 would be in a group, question 2 in a group, etc. For five minutes, ask each group to discuss the responses they received and to identify themes. Next, have each group report their themes to the larger group.

COMMUNITY NORMS/EXPECTATIONS

Community Norms

Community norms (often called guidelines or rules) are important to building a sense of community. In addition, they help build trust and a sense of safety in a larger group. It is suggested to avoid the word "rules" when developing community norms because "rules" often involve the decision/rule being made by someone with more power. We call them community norms, because these are the acceptable and encouraged behaviors that the community is deciding upon.

Here are a few suggested guidelines:

- Step Up/Step Back – Those who talk a lot and tend to dominate the discussion should challenge themselves to step back and give time for other voices. Those who find it easy to remain quiet and blend in with the background should challenge themselves to step up and contribute to the conversation.
- Willingness to Challenge Others and Be Challenged Yourself – We are all human will say and do something that hurts or offends someone throughout the project. This guideline asks participants to "call each other out" when something offensive is said or done. In addition, the person being called out should challenge themselves to listen and consider what people are saying instead of the immediate defensive response and back peddling.
- Make Your Needs Known – If you need additional accommodations, more information, to have something repeated, to take a break, etc., let the group know. Needs cannot be met if they are not known.
- Let Us Be the Timekeepers – We will worry about breaks, if we are going over, how much time is left, etc. We want you to concentrate on the content and getting the most you can out of the sessions.

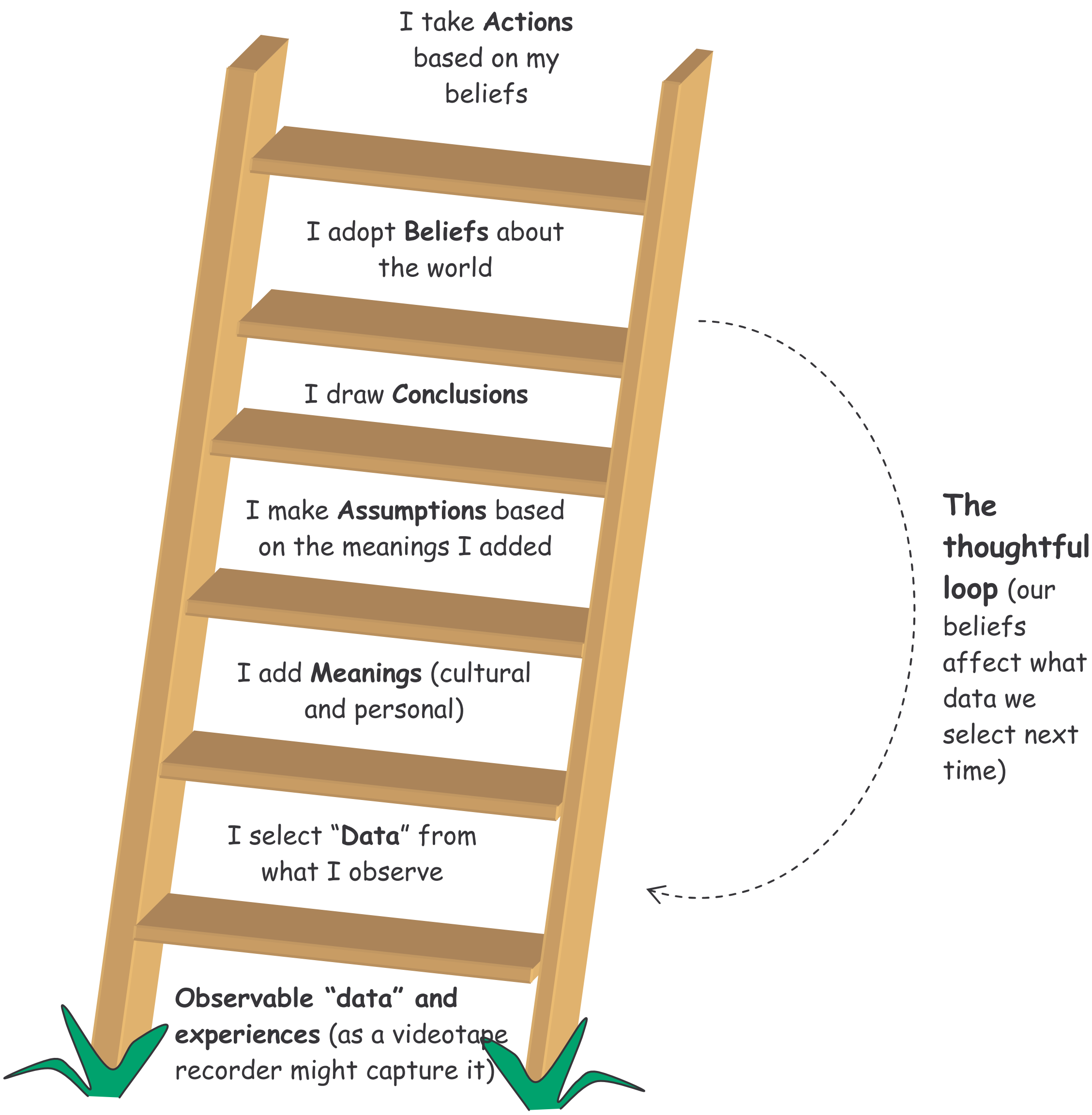
Expectations

This is what is expected of the participants regarding their time in the project and the project itself.

- Attend all training sessions
- Attend all peer-to-peer sessions
- Complete a community leadership project
- Participate in the research aspect of the program
- Have ongoing and frequent communication with emerging/seasoned leader
- To come to each training session prepared/with completed assignments
- To notify facilitators and emerging/seasoned leader if unable to attend a session
- A personal commitment to complete all 18 months of the project

LADDER OF INFERENCE

A PICTURE OF HOW WE THINK AND ACT.[1]



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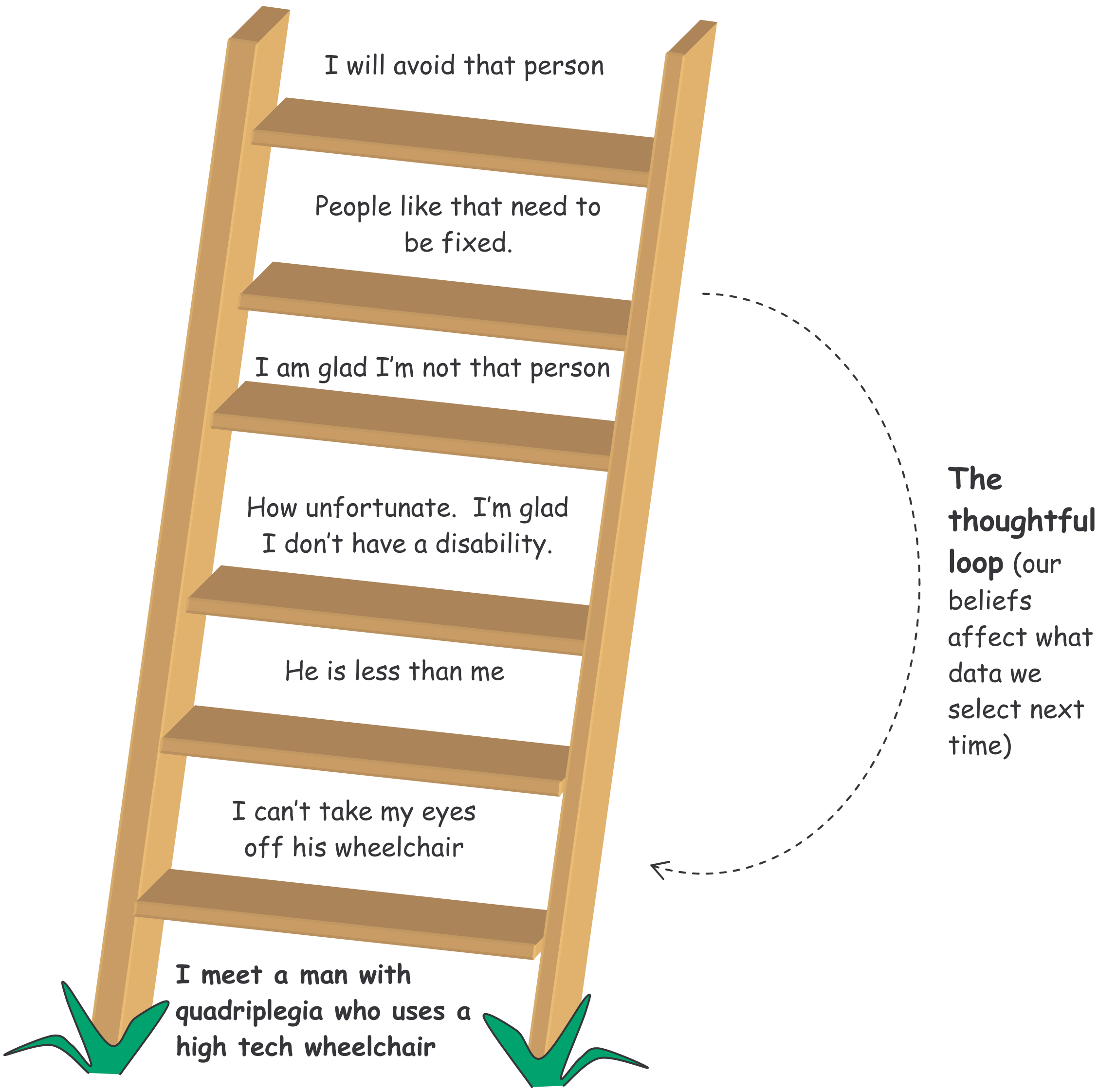
[1] Peter Senge, et al.; Fifth Discipline Fieldbook; Doubleday, 1994

LADDER OF INFERENCE
AN EXAMPLE FROM THE DISABILITY EXPERIENCE



HOW WE USUALLY CLIMB THE LADDER OF INFERENCE[2]

- We are so good at thinking that we jump to the top rungs without knowing it.
- Without paying attention we keep the details of some data and ignore other data
- We have our own understanding about these data and make our own meaning from them.
- We know this because we do not *think* about out *thinking*.
- Thus, the end feels so obvious to us that we see no need to follow the steps we took from the data we selected to the ends we reached.

THE IMPACT OF JUMPING UP THE LADDER

- Our own understanding seem clear and right to us.
- People can and do reach different opinions. When they each view their own opinion as right, they can't see a need to say how they came to believe them.
- People see the different understanding and opinions of others as clearly wrong, and invent reasons to explain why others say things that are so wrong.
- When people disagree, they often hurl thoughts at each other from the top of their respective ladders, making it hard to resolve differences and to learn from one another.

GUIDELINES FOR USING THE LADDER OF INFERENCE

- Notice your opinions as understanding based on your ideas and experience, not as self-evident facts.
- Assume your thinking process could have gaps or errors that you do not see.
- Use examples to illustrate the data you select that led to your conclusions.
- Say (out loud) what you hear the other is saying, so that you can check if you understand correctly.
- Explain the steps in your thinking that take you from the data you select and the meanings you make to the conclusions you reach.
- Ask others if they have other ways of understanding the data or if they see gaps in your thinking.
- Assume that others may reach different opinions because they have their own Ladder of Inference with a logic that makes sense to them.
- Ask others to illustrate the data they select and the meanings they paraphrase.
- Ask others to explain the steps in their thinking.

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[2] Adapted from Pegasus Communications, Action Design 1998, www.pegasuscom.com

LEADERSHIP COMPASS ACTIVITY

Just as each of us learns in different ways, each of us can lead in different ways. As our world and communities have changed, what we have learned is that the old school style of top down leadership simply doesn't work in all situations. In many businesses, institutions, and communities, leadership has become more collaborative. To have an effective collaboration, you need to have people with a variety of skills. This variety creates the best whole.

Source: The Guide to Building Effective Participant Councils

Purpose: To help participants identify their leadership style and see what style of leadership their fellow communities members lean towards.

Materials

- ✓ Copy of each direction to post on wall
- ✓ Copy of handouts for each participant
- ✓ Plenty of room space to break into the four directions

Directions: On four areas of your room, post the four directions – North, East, South, and West – you can copy the included examples (see activities section). Provide each participant with the handouts that describe the work and the leadership traits of the four directions. Give them 5-10 minutes to reflect on the directions and then rank them, number 1 being most like them and number 4 being least like them. Once they have completed that step, have them go to whichever direction they think their number one is. In those groups, give them 5-10 minutes discuss why they felt they were a good match for this direction. Have them identify common strengths and weaknesses of their direction. Staying in their group, ask for volunteers to share some of what was discussed or insights that people gained. Now ask the participants to go to the direction they ranked as their number four, the least like them. Again, give them 5-10 them discuss why they felt they were NOT a good match for this direction and identify common strengths and weaknesses of this direction. Then ask for volunteers to share some of what was discussed or insights that they gained.

Come back as a large group and provide participants with the following handouts (see activities section): "Pitfalls When Styles Are Taken to Excess" and "Suggestions on Working with a…"

As a large group, discuss the following questions for 5-10 minutes:

- Is it better to have a group of the same leadership styles or with different leadership styles? Why?
- How does your leadership style help or hinder a mentor/mentee relationship?

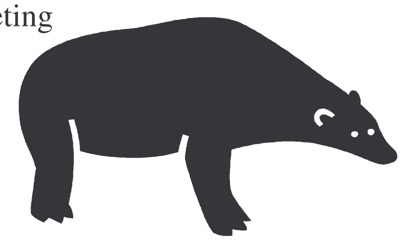
East Eagle

- Visionary
- Sees the big picture
- Very idea oriented
- Focuses on future thought
- Insight into – mission and purpose
- Develops solutions creatively
- Looks for overarching themes, ideas
- Likes to experiment, explore
- Strong spiritual awareness – attitude to "higher level"
- Appreciate a lot of information
- Divergent thinker

Value Words: "option, possibility"
Roles: Big Picture Thinker and Visionary

West Bear

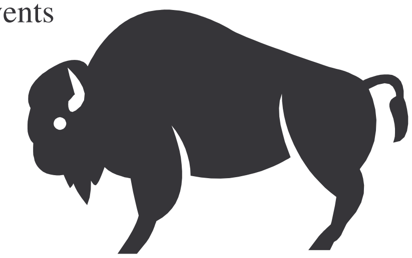
Seen as practical, dependable, and through in task situation



- Seen as practical, dependable, and thorough when completing tasks
- Helpful to others by providing planning and resources
- Moves carefully and follows rules
- Bases decisions on logic and research
- Weighs all sides of an issue, balanced
- Introspective, self-analytical
- Careful, thoroughly examines people's needs in situation
- Works well with existing resources
- Keeper of traditions
- Skilled at finding fatal flaws in an idea or project

Value Word: "objective"
Roles: Evaluator and Follow-up

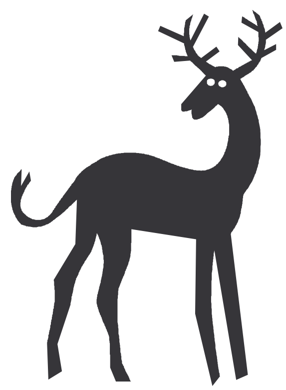
North Buffalo



- Assertive, active, decisive
- Likes to be in control of relationship and determine events
- Quick to act, expresses sense of urgency for others to act
- Enjoys challenges and challenges others
- Thinks in terms of bottom line
- Likes quick pace and fast track
- Courageous
- Perseveres, not stopped by hearing "no," risk taker
- Likes variety, novelty, new projects
- Comfortable with being in front
- Good motivator of others

Value Words: action oriented phrases: "Do it now," "I'll do it," "What's the bottom line?"
Roles: Leader and Driver

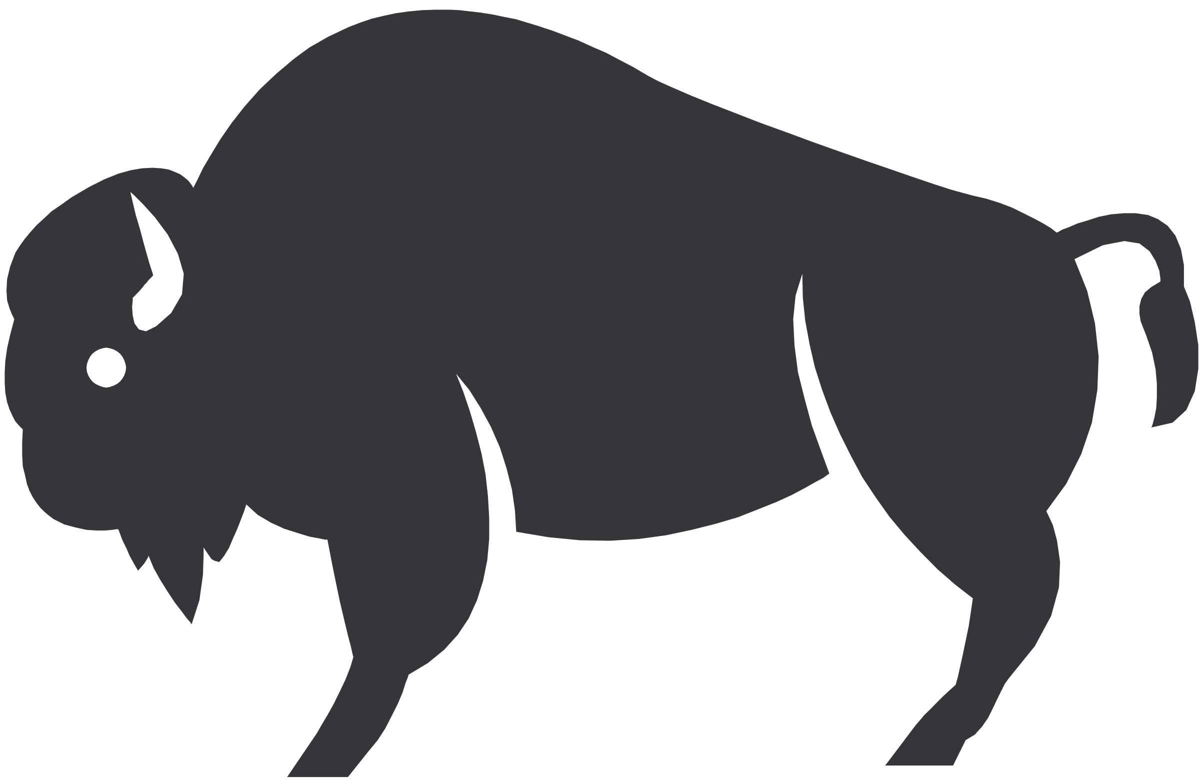
South Deer



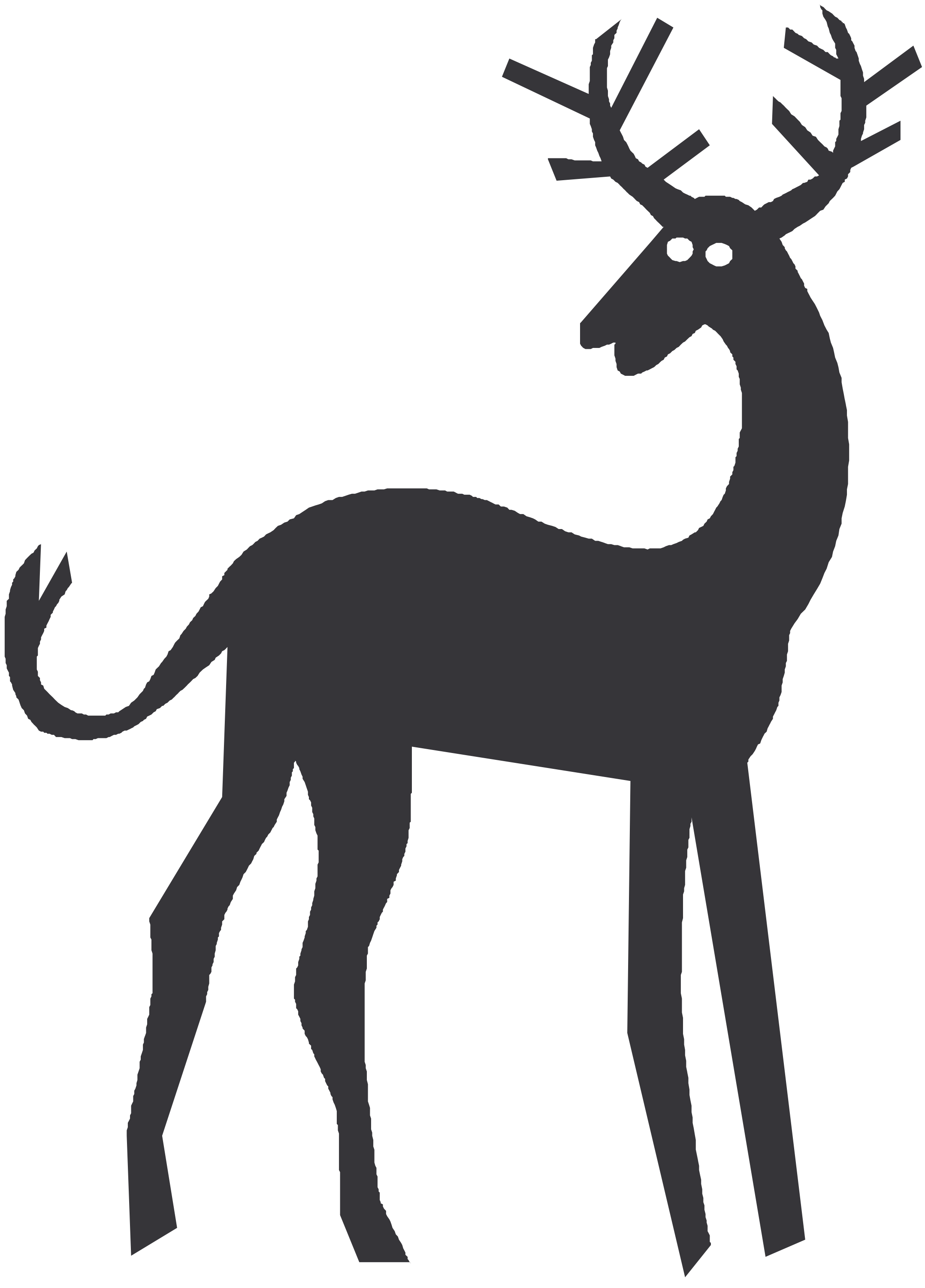
- Allows others to feel important
- Value driven regarding aspects of professional life
- Establishes relationship to accomplish tasks
- Interaction is primary
- Concerned with process
- Supportive, nurturing to colleagues and peers
- Willingness to trust others' statements at face value
- Feeling-based, trusts own emotions and intuition
- Team player, receptive to other's ides, builds on ideas of others, noncompetitive
- Able to focus on present moment
- Concerned with creating a positive environment

Value words: "right, fair"
Roles: Relationships and Process

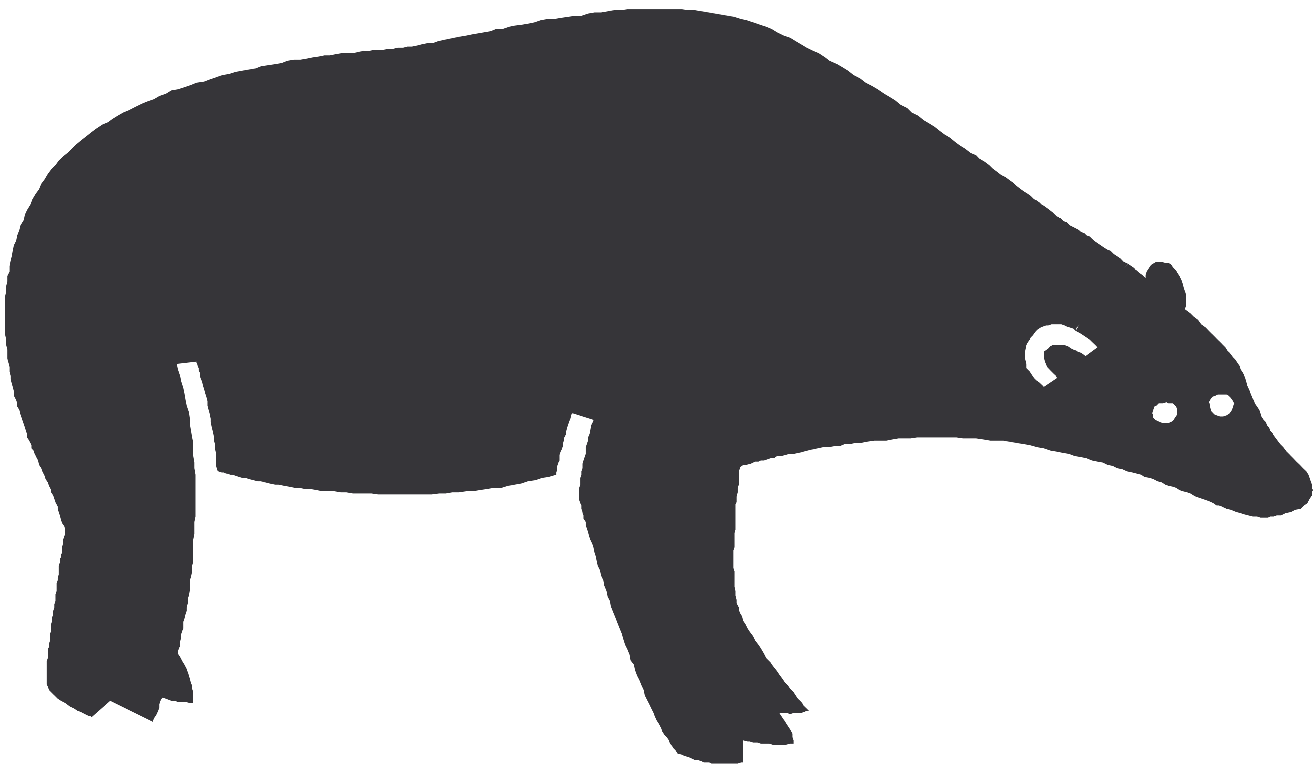
North/Buffalo



South/Deer

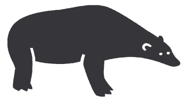
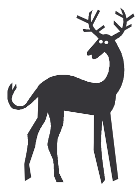


West/Bear

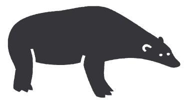
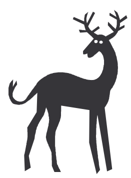


East/Eagle

Leadership Compass: Pitfalls When Styles are Taken to Excess

West/Bear  • Can be bogged down by information, analysis paralysis • Can become stubborn and entrenched in position • Can be indecisive, collect unnecessary data, mired in detail • May appear cold and withdrawn, with respect to others' working styles • Tendency towards watchfulness, observation • Can remain withdrawn, distant • Resists emotional pleas and change	North/Buffalo  • Can be bogged down by need to press ahead and decide • Seem to not care about process • Can get defensive quickly, argue, try to out expert you • Can loose patience, pushes for decisions before its time • May get autocratic, want things their way, plow over people in decision making process • May go beyond limits, gets impulsive and disregard practical issues • Sees in terms of black and white, little tolerance for ambiguity • Not heedful of others' feeling, may be perceived as cold
South/Deer  • Can be bogged down when believes relationship and needs of people are being compromised • Has trouble saying "no" to requests • Internalizes difficulty and assume blame • Prone to disappointment when relationship is seen as secondary task • Difficulty confronting and dealing with anger, may be manipulated by anger • Easily taken advantage of • Immersed in present, looses tract of time • Immersed in NOW, man not see long-range view	East/Eagle  • Can be bogged down by lack of vision or too much emphasis on vision • Can lose focus on tasks • Poor follow through on projects • May become easily overwhelmed • Not time-bound, may lose track of time • Tends to be highly enthusiastic early on, then burnout over the long haul • Can develop a reputation of lack of dependability

Leadership Compass: Suggestions on Working with A…

West/Bear  • Allow plenty of time for decision making • Provide objective facts and figures a person can trust • Don’t be put off by critical “no” statements • Minimize expression of emotion, use logic when possible • Appeal to tradition, sense of history, correct procedure	North/Buffalo  • Present your case quickly, clearly and with enthusiastic confidence • Let them know how they will be involved – their pay off and their role • Focus on the “challenge’ of the task • Provide plenty of autonomy • When establishing timelines, stick with them • Give positive public recognition • Use them in tasks requiring motivation, persuasion, and initiative
South/Deer  • Remember process, attention to what is happening in the relationship ,feelings between you right now, is of primary importance • Needs to feel decisions are ethically right- justify decision around values, ethics, the ritghtr5 things to do • Appeal to relationships between you and this person, this person and others • Listen hard and allow the expression of feeling and intuition in logical arguments • Easily steamrolled, beware this person may have a hard time saying “no” to you • Provide plenty of positive reassurance • Let this person know you like them personally and appreciate them	East/Eagle  • Show appreciation and enthusiasm for ideas • Listen and be patient during idea generation • Avoid critical, judging statements of ideas • Allow and support divergent thinking • Provide a variety of tasks • Provide help and supervision checkpoints on detail and project follow-through

MODEL COMPARISON CHART

Connections for Community Leadership

Michigan Disability Rights Coalition

3498 East Lake Lansing Road, Suite 100
East Lansing, MI 48823

Phone: 1-866-532-2669
Fax: 517-333-2677

Lejuste Leadership Model
Comparative Outcomes

	Self-Determination	**Community Membership**	**Visionary Leadership**
Worth	I am worthy of respect	I am worthy of joining others	I am worth listening to
Self-Knowledge	I know my strengths and limitations.	I know what I have to offer others.	I know what my group can do.
Desire:	I know what I want.	I know what my group wants.	I know what needs to be done by my group.
Voice	I speak up for myself.	I am part of a shared voice.	I can voice my group's issues.
Action	I take action	I take action with others.	I lead my group's actions.
Reflection	I reflect and learn about myself	I reflect and learn about my group	I reflect and learn about my leadership.

CONTROL MODEL OF LEADERSHIP[3]

CORE VALUES AND ASSUMPTIONS

- Achieve my goal through unilateral control
- Win, don't lose
- Minimize expressing negative feelings
- Act Rational

- I understand the situation; those who see it differently do not
- I am right; those who disagree are wrong
- I have pure motives; those who disagree have questionable motives
- My feelings are justified

STRATEGIES

- Advocate my position
- Keep my reasoning private
- Don't ask other about their reasoning
- Ease In
- Save face

CONSEQUENCES

- Misunderstanding, unproductive conflict and defensiveness
- Mistrust
- Self-fulfilling, self-scaling processes
- Limited learning
- Reduced effectiveness
- Reduced quality of work life

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[3] Schwarz, Davidson, Carlson, McKinney, et. Al.; The Skilled Facilitator Fieldbook; Jossey-Bass, San Francisco; 2005.

GIVING UP CONTROL MODEL OF LEADERSHIP[4]

Core Values and Assumptions

- Valid Information
- Free and informed choice
- Internal commitment
- Compassion

- I have some information; others have other information
- Each of us may see things the others do not
- Differences are opportunities for learning
- People are trying to act with integrity given their situations

Strategies

- Test assumptions and inferences
- Share all relevant information
- Use specific examples and agree on important words
- Explain reasoning and intent
- Focus on interests, not positions
- Combine advocacy and inquiry
- Jointly design the approach
- Discuss undiscussables
- Use a decision-making rule that generates the commitment needed

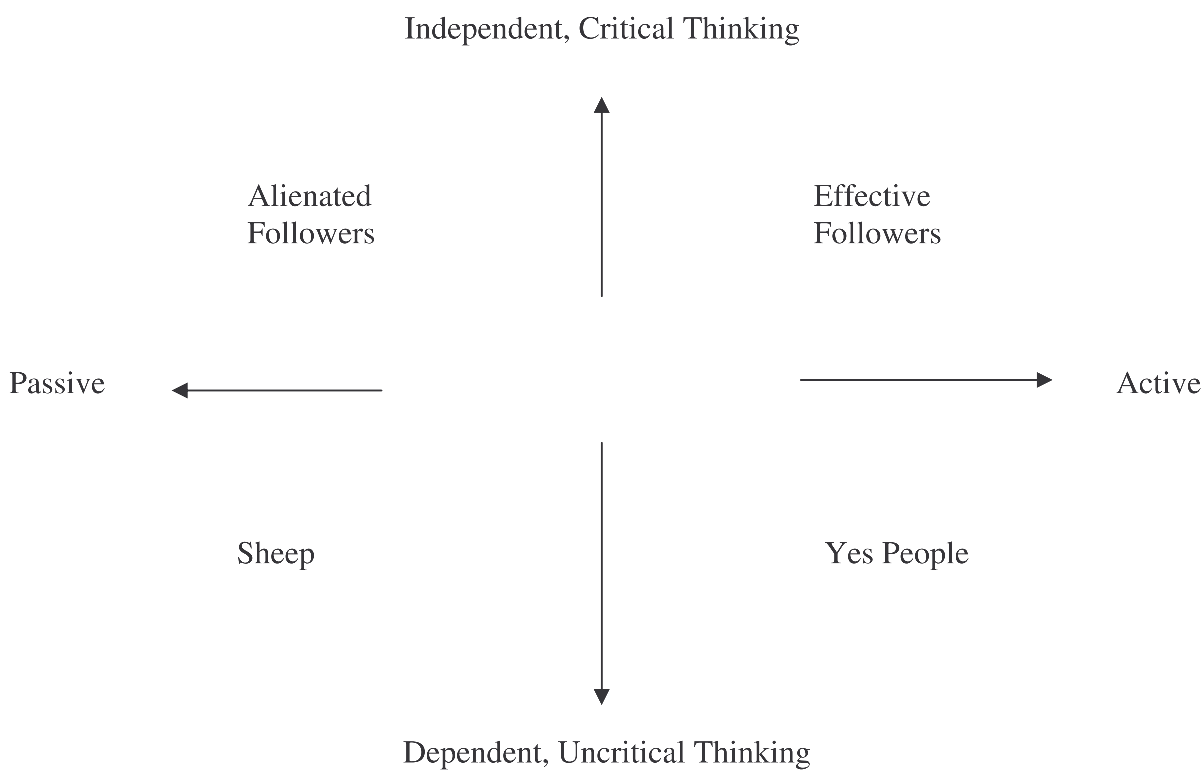
Consequences

- Increased understanding, reduced unproductive conflict and defensiveness
- Increased trust
- Reduced self-fulfilling, self-sealing processes
- Increased learning
- Increased effectiveness
- Increased quality of work life

[4] Schwarz, Davidson, Carlson, McKinney, et. Al.; The Skilled Facilitator Fieldbook; Jossey-Bass, San Francisco; 2005.

EFFECTIVE FOLLOWERS MATRIX[5]

Some Followers Are More Effective



[5] Kelly, Robert E.; "In Praise of Followers"' Harvard Business Review; November-December, 1988.

PROUD AND POWERFUL DEFINITIONS

Disability Pride
As a large group, discuss the concept of disability pride with the participants. Connections for Community Leadership's definition reads, "Accepting and honoring our uniqueness and seeing it as a natural and beautiful part of human diversity. Pride comes from celebrating our own heritage, culture, unique experiences and contributions" and includes the following bullet points:

- Disability pride recognizes the power we have to make change.
- Disability pride results when we challenge and ultimately undo the negative beliefs, attitudes, and feelings and systematic oppression that come from the dominate groups' thinking that there is something wrong with our identity or our disabilities.
- Disability pride rejects shame and the need to "blend in."
- Disability pride is self acceptance and validation of our uniqueness.
- Disability pride results in making choices based on the respect for interdependence, accommodations, and creativity.
- Disability pride is the feeling of strong connection with a community of other people.
- Disability pride recognizes that it is our uniqueness that will transform all people and institutions (society).

Self-Empowerment (Powerful)
The word "power" is usually expressed in negative terms; it's seen as having control over someone else. There's the idea that "good" people stay away from power. However, the word "power" actually comes from the Latin word "posse" which means "to be able." The focus here is on our own power to make positive choices and changes in our lives AND our power as a community by influencing others and making significant change for more than ourselves.

The word "empower" means to give power to someone else. This infers that there is a power dynamic – that one has more than the other and will give up some power for the "lesser" person.

Connections for Community Leadership decided to use the word "self-empowerment" to describe what it means to be powerful. This eliminates the hierarchy that someone else is giving us power. CCL's definition of self-empowerment reads, "Knowing and feeling one's pride and applying our unique voice, skills, and actions with energy and confidence to achieve a vision (of full citizenship in all places: personal relationships, home, school, work, community, institutions, etc.)" and includes the following bullet points:

- Includes the commitment to provide personal and institutional support for people with disabilities who are seeking to claim their full and rightful place, power, and pride.

- Knowing, practicing, and using the skills to make changes.
- Is expressed when disability communities protest discrimination and celebrate disability culture, heritage, and history.

DISABILITY HISTORY TIMELINE ACTIVITY

Key to becoming proud and powerful is understanding the history of oppression of people with disabilities and knowing that there is also a history of resistance by people with disabilities.

Source: Adapted by Michigan Disability Rights Coalition from Melanie Morrison's Doing Our Own Work Curriculum.

Purpose: To expose participants to the long history of oppression and discrimination that our community has faced and continues to face. In addition, participants will learn that our ancestors have been fighting and resisting oppression for just as long.

Materials

- ✓ Large timeline on wall
- ✓ List of significant dates of oppression and acts of resistance (provided in Appendix 2)
- ✓ Tape
- ✓ Markers
- ✓ Small pieces of paper

Directions: Cut apart paper and write/type acts of oppression on them. Keep them in order by date. You will want enough pieces/dates so that each participants has at least 2 dates to read. Do the same with acts of resistance. Next, tape up a large timeline to the wall with a date range that covers the dates you have selected to use. On the left hand side near the top, write the word "Oppression". On the left hand side near the bottom, write the work "Resistance." Have participants sit in a close circle. The facilitator should explain that this can be a very emotional and intense experience and that the activity is to be done in silence. Next, pass out the sheets of paper with the dates in history when people with disabilities have been oppressed (be sure to keep them in order as you pass them around the circle). Explain that each person will read their dates one at a time going around the circle until all dates have been read. After each person reads their date, they are to tape it to the top section of the large timeline on the wall and return to their seat. Once all dates have been read and taped to the timeline, as a large group, discuss how it feels to hear and see the history of oppression of our brothers and sisters. After the discussion is over, pass out the sheets of paper with dates of important acts of resistance (be sure to keep them in order as you pass them around the circle). Go around the circle and have each participant read their dates of resistance and tap them to the bottom section of the large timeline on the wall. Once all dates have been read and taped to the timeline, as a large group, discuss how it feels to hear and see the acts of resistance throughout history. After this discussion, ask each person to go and write their name and the date they started their disability leadership journey on the resistance section of the large timeline on the wall.

SIGNIFICANT DATES IN DISABILITY HISTORY – OPPRESSION & RESISTANCE

BC

3500 BC
The Rig-Veda, an ancient sacred poem of India, is said to be the first written record of a prosthesis. Written in Sanskrit between 3500 and 1800 BC, it recounts the story of a warrior, Queen Vishpla, who lost her leg in battle, was fitted with an iron prosthesis, and returned to battle.

218 BC
Marcus Sergius, a Roman general who led his legion against Carthage (presently Tunis) in the Second Punic War, sustained 23 injuries and a right arm amputation. An iron hand was fashioned to hold his shield and he was able to go back to battle. He was denied a chance to become a priest because it was thought that one needed two normal hands.

0 - 1700 AD

1500
Girolamo Cardano (1501-1576) was the first physician to recognize the ability of the Deaf* to reason.

1508
Gotz von Berlichingen, German mercenary knight, had a reputation as a Robin Hood, protecting the peasants from their oppressors. In 1508 he lost his right arm in the Battle of Landshut. Gotz had two prosthetic iron hands made for himself. These were mechanical masterpieces. Each joint could be moved independently by setting with the sound hand and relaxed by a release and springs. The hand could pronate and supinate and was suspended with leather straps.

1616
G. Bonifacio published a treatise, Of The Art of Signs, discussing sign language.

1696
Pieter Andriannszoon Verduyn (Verduuin), a Dutch Surgeon, introduced the first non-locking, below-knee prosthesis. It bears a striking similarity to today's joint and corset prosthesis.

1755
Samuel Heinicke established the world's first oral school for the Deaf in Germany.
Charles Michel Abbe del' Epee established the world's first free school for the Deaf in Paris, France.

1760
Thomas Braidwood opened the first school for the Deaf in England.

1784
Abba Silvestri opened the first school for the Deaf in Italy in Rome.

1790
In Paris, Pinel unshackled people with mental illnesses.

1805
Rush's Medical Inquiries and Observations was the first modern attempt to explain mental disorders.

1809
Louis Braille was born (4 Jan 1809) at Coupvray, near Paris. At three years of age an accident deprived him of his sight, and in 1818 he was sent to the National Institute for the Young Blind, which had been founded by Valentin Hauy.

1815
Thomas H. Gallaudet departed America for Europe to seek methods to teach the Deaf.

1817
Connecticut Asylum for the Education and Instruction of Deaf and Dumb Persons, the first permanent school for the Deaf in America, opened in Hartford on 15 April.

1822
American School for the Deaf added vocational training to curriculum.

1829
Louis Braille invented the raised point alphabet that has come to be known as Braille.

1846
American Annals of the Deaf began publication at the American School for the Deaf in Hartford.

1851
Thomas Hopkins Gallaudet died on 10 September.

1854
Gallaudet Monument was dedicated in Hartford.

1860
The Braille system was introduced to America and was taught with some success at the St Louis School for the Blind.

1861
The American Civil War (1861-1865) - 30,000 amputations occurred in the Union Army alone.

1872
Alexander Graham Bell opened speech school for teachers of the Deaf in Boston.

1876
Alexander Graham Bell got patent for his telephone invention; exhibited it at Philadelphia Exposition that summer.

1887
Women admitted to the National Deaf-Mute College (now Gallaudet).

1889
National Association of the Deaf unveiled memorial to Thomas H. Gallaudet at National Deaf-Mute College (now Gallaudet University).

1894
National Deaf-Mute College became Gallaudet College.

1916
British Braille became the English language standard (although New York Point and American Braille were both being used in the U.S.) because of the wealth of code already available in the British empire.

1921
The American Foundation for the Blind (AFB), a non-profit organization recognized as Helen Keller's cause in the United States, was founded.

1935
A group in New York City called the League for the Physically Handicapped formed to protest discrimination by the Works Progress Administration (WPA). The league's 300 people -- most disabled by polio and cerebral palsy -- all had been turned down for WPA jobs. The Home Relief Bureau of New York City was supposed to forward their job requests to the WPA, but had stamped all of their applications 'PH' for physically handicapped, as a signal to the WPA not to give these people jobs. Members of the league sat in at the Home Relief Bureau for nine days and subsequently held a weekend sit-in at WPA headquarters. They eventually generated several thousand jobs nationwide.

1939
Amid the outbreak of World War II Hitler ordered widespread "mercy killing" of the sick and disabled. The Nazi euthanasia program was code-named Aktion T4 and was instituted to eliminate "life unworthy of life."

1940
(1940-1944) In Nazi Germany, 908 patients were transferred from Schoenbrunn, an institution for retarded and chronically ill patients, to the euthanasia "installation" at Eglfing-Haar to be gassed. A monument to the victims now stands in the courtyard at Schoenbrunn.

1941
(3 Aug 1941) In Nazi Germany a Catholic bishop, Clemens von Galen, delivered a sermon in Muenster Cathedral attacking the Nazi euthanasia program, calling it "plain murder."
(23 Aug 1941) Hitler suspended Aktion T4, which had accounted for nearly a hundred thousand deaths by this time. However the euthanasia program quietly continued using drugs and starvation instead of gassings.

1953
Ed Roberts, "father of the independent living movement," contracted polio.

1970
Ed Roberts and his peers at Cowell (UC Berkeley Health Center) formed a group called the Rolling Quads.
The Rolling Quads formed the Disabled Students' Program on the UC Berkeley campus.

1971
Ed Roberts and his associates established a Center for Independent Living (CIL) in Berkeley, CA for the community at large. The center was originally in a roach-infested two-bedroom apartment until the Rehabilitation Administration gave them a $50,000 grant in 1972.

1974
Disabled Women's Coalition founded at UC Berkeley by Susan Sygall and Deborah Kaplan. Other women involved included Kitty Cone, Corbett O'Toole, and Susan Schapiro. The coalition ran support groups, held disabled women's retreats, wrote for feminist publications, and lectured on women and disability.

1974
National Association of the Deaf conducted census of Deaf Americans; counted 13.4 million hearing and 1.8 million Deaf Americans.

1976
In his election campaign, candidate Jimmy Carter promised that his administration would sign regulations that had received extensive input from agencies serving people with disabilities, which had taken years to finalize.

1976
Federal Communications Commission authorized reserving TV channel 21 for closed captioning.

1977
(5 Apr 1977) A group of people with disabilities took over the San Francisco offices of the Department of Health, Education, and Welfare to protest Secretary Joseph Califano's refusal to sign regulations for Section 504 of the Rehabilitation Act of 1973. The action, of one-month's duration, became the longest sit-in of a federal building to date. The historic demonstrations were successful and the 504 regulations were ultimately signed.

1977

(4 May 1977) The Section 504 regulations were issued.

1980-83
Sears, Roebuck and Co. began selling decoders for closed captioning for television.
National Disabled Women's Educational Equity Project put on the first national Conference on Disabled Women's Educational Equity in Bethesda, MD.

1980
Harilyn Rousso set up the Networking Project on Disabled Women and Girls at the YWCA in New York City. She produced a book and film entitled Loud, Proud and Female.

1983
(October) National ADAPT action for accessible transportation in Denver, CO at the American Public Transit Association (APTA) Convention.

1988
"Deaf President Now" protest at Gallaudet University in Washington, D.C. First Deaf president at Gallaudet: Dr. I. King Jordan.

1988
(July - Sept) Greyhound across the nation - ADAPT took on the inaccessibility of Greyhound buses.

1989
(September) Opening of a memorial museum for the victims of "euthanasia" and "Special Treatment 14f13" at a psychiatric hospital in Bernburg, Germany.

1990
(26 July 1990) ADA signing ceremony at the White House.
The Secretary of Transportation, Sam Skinner, issued regulations mandating lifts on buses.

1993
Sewering, an SS-member and lung specialist in Germany who had sent a 14-year-old girl with TB to Elfing-Haar to be gassed, became president-elect of the World Physicians Association. A storm of protest forced him to resign.

1995
The struggle for the rights of people with disabilities in Southern Africa took a giant leap forward with the election and appointment to parliament, for the first time in the history of the region, of two women disability leaders in South Africa and Zimbabwe. The election of Maria Rantho early in 1995 to the government of Nelson Mandela in South Africa, and of Ronah Moyo in April to the Robert Mugabe government of Zimbabwe, marked the beginning of an epoch in the history of people with disabilities.

1995

Aug. 31, 1995 The First International Symposium on Issues of Women with Disabilities was held in Beijing, China in conjunction with the Fourth World Conference on Women.
Dec. 26, 1995 The organization of people with disabilities in Cuba (ACLIFM) held their first international conference on disability rights in Havana, Cuba.

1999
Supreme Court rules on Olmstead v. L.C. and E.W. stating that the ADA requires public agencies to provide services in the most integrated setting.

2003
December 23, 2009: U.S. District Judge Patrick Duggan grants a permanent injunction and requires Oakland University to allow Micah Fialka-Feldman to live in a campus dormitory. OU violated the Rehabilitation Act of 1973, when it refused to provide a reasonable accommodation to waive its Housing Department's rule that students must be "seeking a degree" to live on-campus. The Court found OU had failed to conduct an "individualized analysis" of Micah's reasonable accommodation request and it cannot rely, as it did here, on "prejudice, stereotypes and/or unfounded fear" of persons with disabilities when analyzing the reasonableness of such request.

2008
The Higher Education Opportunity Act (P.L. 110-315) (HEOA) was enacted on August 14, 2008 and it reauthorized the Higher Education Act of 1965. This law contains a number of important new provisions that will improve access to postsecondary education for students with intellectual disabilities. Of particular note are several provisions that address financial aid and that create a new model demonstration program and coordinating center for students with intellectual disabilities.

*capitalization is intentional, to reflect the preference of the Deaf community.

Acknowledgement is given to the Disability Social History Project, 225 3rd St, #202, Oakland, CA 94607 and the Museum for DisAbility History for permission to use this material. Material regarding Deaf history was provided to the Disability Social History Project by the Deaf World Web.

Other timelines and disability history resources can be found online:
Mental Heath - http://www.mdx.ac.uk/www/study/mhhtim.htm
Chronology of the Disability Rights Movement - http://www.sfsu.edu/~hrdpu/chron.htm
Disability Social History Project - http://www.disabilityhistory.org/timeline_new.html
Museum of Disability History - http://www.museumofdisability.org/

BAD-L

First Training Session: Day Two

- Proud and Powerful
- Emerging/Seasoned Leader Relationships
- Relationship Pairing
- Social Capital: Part I
- Evaluation and Wrap Up

"Achievement is a we thing, not a me thing, always a product of many heads and hands.
~ J. Atkinson

First Training Session: Day Two

Proud and Powerful

(75 minutes)

Disability Culture Rap Video

Source: Tools for Change: Disability, Identity, & Culture – Advocating Change Together

Disability Culture Rap is a 22-minute experimental documentary exploring disability identity and culture. It was produced by Advocating Change Together in 1999. To purchase a copy, visit www.disabilitytraining.com or call 1-800-543-2119.

Begin by discussing the following questions as a large group:

- What the word "culture" means to you?
- What do we mean by "disability culture?"

Next, show the video.

When participants are done watching the video, discuss the following as a large group:

- What stood out to you?
- What surprised you?
- What are some of the things you learned?

Disability Culture: Who We Are Activity

Source: Tools for Change: Disability, Identity, & Culture – Advocating Change Together

Purpose: To provide a means for understanding and expressing a disability identity.

Materials: Copies of the proclamation handout for participants.

Directions: Break participants into groups of 4-5 people. Referring to the video, remind participants that one way to understand a culture is through history, identity, and customs of its people. To make a formal and personal declaration of what culture means to the group, ask participants to fill in the blanks on the Proclamation handout. This will be "who we are, in our own words." Be sure to let the participants know that there is no right or wrong answers to this exercise and that responses can be long statements or single words. Once groups are done, ask each group to share their responses with the large group.

Welcome and Introductions

(30 minutes)

Toy Building Exercise
Source: Pennie Foster-Fishman

Purpose: To promote team building and demonstrate how people with different leadership styles can work together.

Materials: Plastic cups, yarn, scissors, tape, pom poms, plastic silverware, pipe cleaners, and construction paper.

Directions: Ask participants to form groups of five people with the people around them. Give each group materials and explain to them that they have 10 minutes to build a toy for a child with a disability. Once they are done building their toys, have each group give their toy a name and then give a pitch about their toy to the large group.

As a large group, talk about the process: Was there a leader in your group? If so, how was the leader selected? Thinking back to the Leadership Compass activity, what leadership styles where present in your group? How did you work together? Where there followers? How did this process challenge your mental models?

REFLECTION
(20 minutes)

Reflection is an extremely important tool for leadership development. Connections for Community Leadership uses four key questions to assist with reflection. These questions are:

- What just happened?
- How did it make you feel?
- What does it mean?
- What would you do differently?

It is important that reflection happens individually – that we each take the time to answer these questions for ourselves. It is equally important that we reflect as a group and ask these questions about our process as we work together.

Individual Reflection
A journal is a helpful way to keep our reflections together and learn from ourselves as we continue to develop as emerging and seasoned leaders. Invite participants to spend the next 5-10 minutes writing (or any other form of expression) in their journals answering these reflection questions regarding the toy building activity they just did.

Next, as a large group, discuss the following two reflection questions relating to the toy building activity:

- What just happened?
- What would you do differently?

Before moving on, explain that we will have built in journaling time throughout the trainings, but that it is strongly encourage (or required) to journal throughout the entire process (at home, after peer-to-peer sessions, after conversations with emerging/seasoned leader, when you are feeling emotions, etc.)

EMERGING/SEASONED LEADER RELATIONSHIPS
(80 minutes)

Emerging/Seasoned Leader Group Work
This activity works best if the emerging and seasoned leaders are in different rooms. It is also important to note that this exercise is about thinking about the "groups" (emerging and seasoned leaders) and not the specific individuals in the groups.

Split the group up into emerging and seasoned leaders. There should be a facilitator for each group (a younger facilitator for the emerging leaders and vice versa). Each group should answer the following questions with WORDS – NOT SENTENCES: *Make sure they write their answers for each question on a separate piece of flip-chart paper.*

- How do we (emerging or seasoned leaders) see ourselves?
- How do we think the other group (emerging or seasoned leaders) sees us?
- How do we see the other group (emerging or seasoned leaders)?
- What are the most important qualities for our relationship?

After each group has answered the questions, come back as a large group. Have each group report their answers to the other group. Then as a large group, have participants discuss their reactions, thoughts, questions, etc. Answer questions such as: How did what you heard make you feel? What does this mean for working together?

Defining the Relationship
It is important in most working relationship that strong partnerships develop. It is even more critical in mentor and mentee relationships that a sense of trust and belief in one another as partners exist. Strong partnerships with these qualities often foster an "alliance" between the partners involved. The alliance that is created from the mutual understanding, respect and support for each partner increases the potential for positive results in the working relationship.

The emerging/seasoned leader relationship should resemble an alliance. Throughout the project, you will work to build a supportive relationship with each other. There is no formula for achieving it, but warmth, empathy, respect, and interest are always important. In supporting each other, you are agreeing to teach each other; learn from each other and work together toward your project goals. Effective partnerships and alliances often make for successful projects.

There are several signs that the emerging/seasoned leader relationship is effective including:

- Mutual Agreement – This can be around the topics of leadership, strategies for change, who to contact, short and long term goals, etc.

- Mutual Teaching/Learning – This is evident when both the emerging and seasoned leaders are teaching each other as well as learning from each other.
- Strong Emotional Bond – When there is a mutual like, trust, and appreciation for each other.

RELATIONSHIP PAIRING

(45 minutes)

Speed Dating Activity

Purpose: To assist in matching up the emerging and seasoned leaders.

Materials: Emerging leaders should have their list of idea qualities, values, etc. that they are looking for in a mentor, pens/pencils, and ranking sheet.

Directions: Prior to start of activity, set up stations around the room where each interview can take place. An example is two chairs by a small table or just two chairs facing each other. Explain to the large group that this activity is going to help in determining the emerging/seasoned leader pairs for the project. This activity is similar to speed dating. Ask all the emerging leaders to take a seat at a station in the room. Next, have the seasoned leaders each sit at a station with an emerging leader. Explain that the emerging leaders will be given 5-7 minutes to interview the seasoned leader they are sitting with. After the interview, all of the seasoned leaders will get up and move one station to the right (or left). Once again, give the emerging leaders 5-7 minutes to interview the new seasoned leader across from them. Then the process will repeat until the emerging leaders have interviewed all of the seasoned leaders. Let the interviewing begin!

Once the interviews are completed. Ask the participants to rank the emerging/seasoned leaders in order of who they feel would be their best match to who they think they are least compatible with. Make sure they write their own name down at the top of the paper as well. (See the end of this section for a sample form.) Then collect their responses.

Build in a break somewhere after this activity to allow the facilitators to take the responses and use them in making the final matches to announce at the end of the day. The final decisions should be based on the emerging leaders' rankings and the seasoned leaders' rankings are to be used to break a tie.

SOCIAL CAPITAL: PART I

(20 minutes)

"Social capital" has been defined as the ability of people to work together to make things happen--a sense of belonging. All kinds of volunteer groups--school, sports, senior citizen, church, veteran's, agricultural, professional, outdoor, book club, health and support, and public safety--can build a sense of trust, belonging, and social capital. Supporting children to learn communication and relationship skills is an investment in social capital. People who have different experiences and points of view can use the idea of social capital to find common ground and work with challenging social issues.

Social capital is the idea that our network of relationships has worth. The quality of the relationship directly influences its value. In our private lives individuals with a wide group of trusted friends and family can call on that network in times of trouble. In our public lives, including our jobs, our volunteer circles, and our faith communities a network of positive relationships can get us in doors and help make things happen. When an emerging leader pays attention to building a reputation where others appreciate their involvement and respect their work, their social capitol increases.

There are resources we can access within our relationships such as job referrals, social support, having someone watch your house while on vacation, etc. Have participants brainstorm ideas of resources our network give us access to. Have someone write them down on a flipchart in the front of the room.

In fact, 70% of jobs are filled because of who the applicant knows. People get through the doors of power because of who they know. People get attention for their individual problems in service systems because of who they know.

One of the purposes of this leadership program is to increase the number of people in your social capital map. It is our intention that by knowing each other you will expand your social capital. We hope seasoned leaders will assist emerging leaders meeting this goal.

Social Capital Activity

Be clear that this activity is centered specifically around their network as leaders in the disability movement.

Individuals have all kinds of people and resources in their social networks. Part of becoming an effective leader is realizing who you have in your network and who else you need to create linkages with to create the changes you are targeting.

As a first step in understanding your own social network, we would like you to create a "picture" of the people and organizations that you can rely on as a leader. *Refer participants to the social capital networking activity in their binders.* To create this picture, follow the steps below:

Step 1. *Who is in your support network*: On the left column of the first sheet, list **all of the people and organizations that you can count on to support you** in your work as leader in the disabilities movement.

Don't Forget:

- Family
- Friends and their family members
- Groups you are connected to

- Specific members of the groups that hold some kind of position in the world
- Volunteer connections
- Job connections
- Faith community connections

Step 2: *Who are they*? Identify who each person is in your network in the right column on the same page. Circle if they are a family member, friend, co-worker/neighbor, or another leader. Feel free to circle more than one thing for each person.

Step 3: *What kinds of support do you get?* Think about how each person supports you as a leader. Place each person in the "support corner" they belong to on page 4 by writing their name in the corner they belong to. Each person's name can be written in more than one corner (if they provide you with more than one type of support). . Here are some descriptions of the four support corners:

Emotional Support: Cheers you along when you are facing challenges, helps make you feel better about your efforts, helps you realize what a great leader you are.

Provides Resources: Offers the resources you need to be a leader, like transportation to a meeting, access to a phone, access to a list of people to call, $$$ to support some cause.

Gives Information: Answers questions you might have; gives you information to help you take action or figure out what to do; helps you solve dilemmas you are facing, links you to other information sources.

Takes Action: Is willing to work side by side with you to make change happen; will attend meetings, march, or write letters, if needed.
Step 3: *What does your network picture tell you?* Look as your network picture and ask yourself the following questions:

Step 4: *Reflecting on your network*. Now, take a step back and look at your network. What does it tell you? Here are some questions to think about?

1. Do you have enough diversity in your network? For example, are they all family members? Are you connected to any other leaders?
2. Are you getting the kinds of support you need to be an effective leader? For example, do you have people in your network you can depend upon to take action with you?

At various times during your participation in BAD-L we may ask you to make another map. We also encourage you to add to map as you make connections with people who will help in your project goals.

EMERGING/SEASONED LEADER PAIRS

(15 minutes)

Announce the final decision of the emerging/seasoned leader pairs to the group. Give them time to meet with each other and exchange contact information, etc. While they are meeting in their pairs, have them discuss the following questions: What is motivating to this person? What is valued? What is important to this person? What is the best way for them to learn something?

Evaluation and Wrap Up

(30 minutes)

Summarize what participants learned today and key themes that emerged. Spend time answering questions the participants may have.

Give participants 10 minutes to write in their journals reflecting on the day. Ask participants if they can recall the reflection questions. If not, remind them:

- What just happened?
- How did it make you feel?
- What does it mean?
- What would you do differently?

Give participants 5-10 minutes to complete a written evaluation of the first two days of training. *Be prepared to assist people with reading, writing, etc. if necessary.*

As a group, discuss the following questions:

- What did you like about the past two days?
- What didn't you like?
- What worked well?
- What would you change and how?

Communication

Have them discuss the different modes of communication and how they would best like to communicate with each other between training sessions.

Remind them of the next training date, location, time, and anything they need to do between the sessions.

Homework:

- As a pair, they are to identify a problem and goal they want to work on for their project.
- They should be inviting each other to the meetings they attend that are relevant. This allows them the chance to see each other in action and provide the young leader with connections and a venue to begin networking in.
- They should complete the worksheet regarding the meetings they attend. This worksheet ties the meeting to the key concepts from the first two days of training.
- Young leaders should make a list of organizations they want to be leaders in or have connections with after the project.

- Emerging leaders should create a network map of themselves and include where they want to be connected to as well. Then show the map to your seasoned leader and get feedback on who to add. Then together, identify critical people on the map.
- Send an email to the entire group (using the preferred method of communication decided by the group) stating your name, someone you think is a leader, and one word to describe why you think they are a leader.
- Reflect on process as a leader and their personal goals (learning, connecting, leading, action) in their journals.

First Training Session Day Two Activities and Binder Materials

- **Activities**
  - Who We Are
  - Toy Building
  - Speed Dating
- **Binder Materials**
  - Social Capital Networking
  - Meeting Worksheet

"No one can make you feel inferior without your consent."
~ Eleanor Roosevelt

WHO WE ARE ACTIVITY

Source: Tools for Change: Disability, Identity, & Culture – Advocating Change Together

Purpose: To provide a means for understanding and expressing a disability identity.

Materials

- ✓ Copies of the handout (next page)
- ✓ Pens or Pencils

Directions: Break participants into groups of 4-5 people. Referring to the video, remind participants that one way to understand a culture is through history, identity, and customs of its people. To make a formal and personal declaration of what culture means to the group, ask participants to fill in the blanks on the Proclamation handout. This will be "who we are, in our own words." Be sure to let the participants know that there is no right or wrong answers to this exercise and that responses can be long statements or single words. Once groups are done, ask each group to share their responses with the large group.

Proclamation

Who am I? I am:

Naming and claiming our history:

Naming and claiming our rights:

We are so many things. We are:

Passing the word – disability culture is about:

The people united:

TOY BUILDING EXERCISE

Source: Pennie Foster-Fishman

Purpose: To promote team building and demonstrate how people with different leadership styles can work together.

Materials: Plastic cups, yarn, scissors, tape, pom poms, plastic silverware, pipe cleaners, and construction paper.

Directions: Ask participants to form groups of five people with the people around them. Give each group materials and explain to them that they have 10 minutes to build a toy for a child with a disability. Once they are done building their toys, have each group give their toy a name and then give a pitch about their toy to the large group.

Materials

- ✓ Plastic cups
- ✓ Yarn
- ✓ Scissors
- ✓ Tape
- ✓ Pom poms
- ✓ Plastic silverware
- ✓ Pipe cleaners
- ✓ Construction paper

As a large group, talk about the process: Was there a leader in your group? If so, how was the leader selected? Thinking back to the Leadership Compass activity, what leadership styles where present in your group? How did you work together? Where there followers? How did this process challenge your mental models?

Speed Dating Activity

Purpose: To assist in matching up the emerging and seasoned leader pairs.

Materials

- ✓ Copies of the handout (next page)
- ✓ Pens or Pencils
- ✓ Mentees' lists of what they want in a mentor

Directions: Prior to start of activity, set up stations around the room where each interview can take place. An example is two chairs by a small table or just two chairs facing each other. Explain to the large group that this activity is going to help in determining the emerging/seasoned leader pairs for the project. This activity is similar to speed dating. Ask all the emerging leaders to take a seat at a station in the room. Next, have the seasoned leaders each sit at a station with a emerging leader. Explain that the emerging leaders will be given 5-7 minutes to interview the seasoned leader they are sitting with. After the interview, all of the seasoned leaders will get up and move one station to the right (or left). Once again, give the emerging leaders 5-7 minutes to interview the new seasoned leader across from them. Then the process will repeat until the emerging leaders have interviewed all of the seasoned leaders. Let the interviewing begin!

Once the interviews are completed, ask the emerging leaders to write down their top three choices of mentors in order. Make sure they write their name down as well. Then collect their responses.

Build in a break somewhere after this activity to allow the facilitators to take the responses and use them in making the final matches for the project.

Emerging Leader Speed Dating Results:

Name: ____

My rankings of the seasoned leaders are:

1) ___________________________________ (most compatible with me)

2) ___________________________________

3) ___________________________________

4) ___________________________________

5) ___________________________________

6) ___________________________________

7) ___________________________________

8) ___________________________________ (least compatible with me)

Emerging Leader Speed Dating Results:

Name: ____

My rankings of the seasoned leaders are:

1) ___________________________________ (most compatible with me)

2) ___________________________________

3) ___________________________________

4) ___________________________________

5) ___________________________________

6) ___________________________________

7) ___________________________________

8) ___________________________________ (least compatible with me)

Seasoned Leader Speed Dating Results:

Name: ____

My rankings of the emerging leaders are:

1) __________________________________ (most compatible with me)

2) __________________________________

3) __________________________________

4) __________________________________

5) __________________________________

6) __________________________________

7) __________________________________

8) __________________________________ (least compatible with me)

Seasoned Speed Dating Results:

Name: ____

My rankings of the emerging leaders are:

1) __________________________________ (most compatible with me)

2) __________________________________

3) __________________________________

4) __________________________________

5) __________________________________

6) __________________________________

7) __________________________________

8) __________________________________ (least compatible with me)

SOCIAL CAPITAL: PART I

"Social capital" has been defined as the ability of people to work together--a sense of belonging. All kinds of volunteer groups--school, sports, senior citizen, church, veteran's, agricultural, professional, outdoor, book club, health and support, and public safety--can build a sense of trust, belonging, and social capital. Supporting children to learn communication and relationship skills is an investment in social capital. People who have different experiences and points of view can use the idea of social capital to find common ground and work with challenging social issues.

There are resources we can access within our relationships such as job referrals, social support, having someone watch your house while on vacation, etc.

Social capital is the idea that any individual network of relationships that has worth. In our private lives individuals with a wide group of trusted friends and family can call on that network in times of trouble. In our public lives, including our jobs, our volunteer circles, and our faith communities a strong network can get us in doors and help make things happen.

70% of jobs are filled because of who the applicant knows. People get through the doors of power because of who they know. People get attention for their individual problems in service systems because of who they know.

One of the purposes of this leadership program is to increase the number of people in your social capital map. It is our intention that by knowing each other you will expand your social capital. We hope seasoned leaders will assist emerging leaders meeting this goal.

My Support Network

Please list **all of the people and organizations that you can count on to support you** in your work as leader in the disabilities movement.

Who supports me?	Who are they?
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
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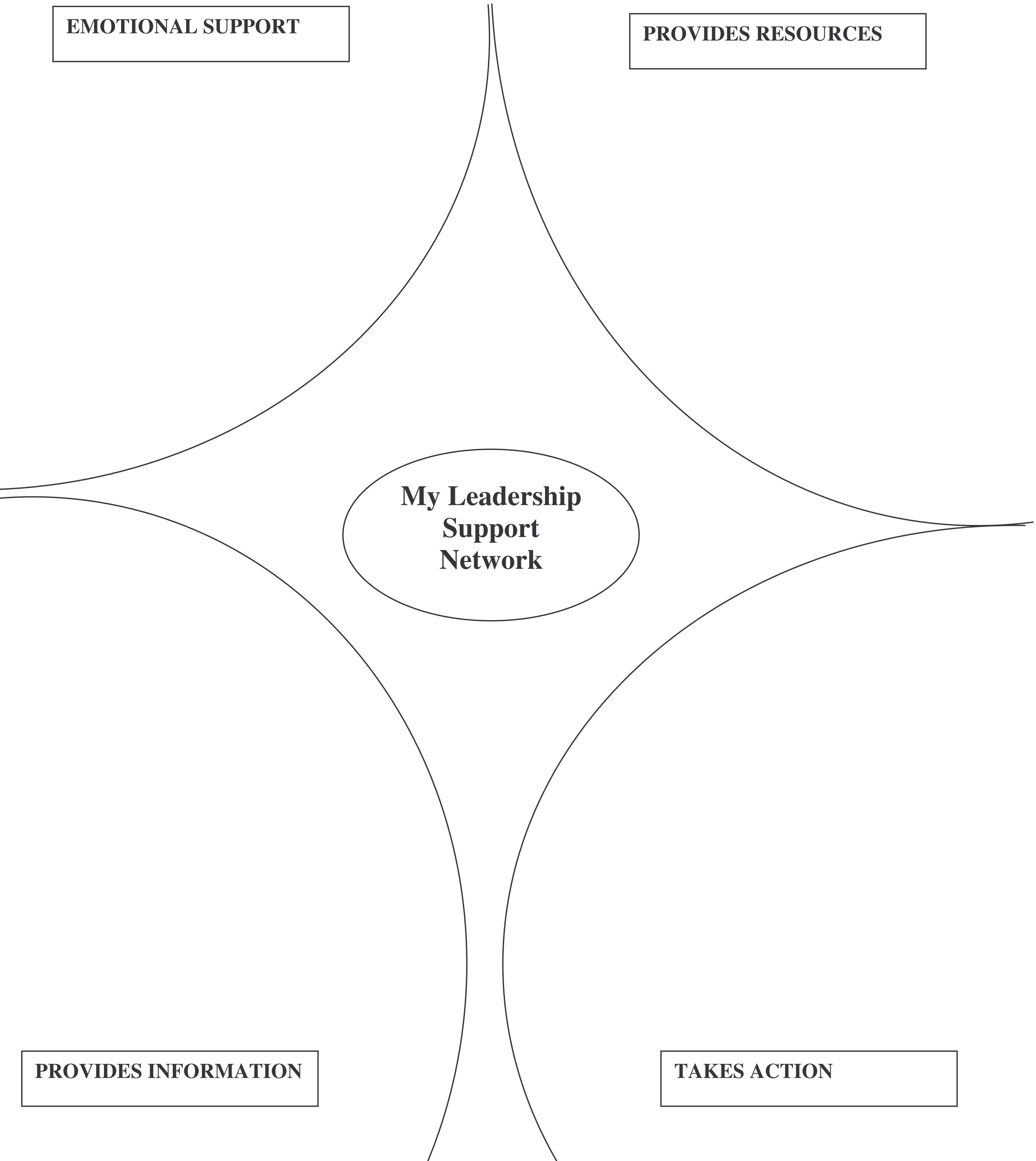
	Family Friend Co-worker Leader


EMOTIONAL SUPPORT
PROVIDES RESOURCES
My Leadership Support Network
PROVIDES INFORMATION
TAKES ACTION

HOMEWORK: LEADING THROUGH MEETINGS

Leaders attend a lot of meetings. As part of developing yourself as a leader, it is important to begin to link the concepts we talk about in our training sessions to the meetings you attend and change efforts you participate in. The homework for this session is designed to help you begin to make these connections.

This homework has two parts.

Part 1: On the attached sheet, list every meeting you attend in the next month that is related to disability issues or making change happen in the disabilities movement.

Part 2: For two of these meetings, reflect on how much you saw the concepts we talked about in action. Write your reflections to the following questions on the attached reflection sheet:

- **What type of leadership style did the meeting leader use?** For example, were they a bear, buffalo, deer or eagle? How could you tell? (If you were the meeting leader, reflect on your own style.)
- **Was this an effective style for this group**? Why or why not?
- **How might the meeting have benefited from systems thinking?** Were there any interdependencies, feedback processes, time delays, leverage points, for example, that participants didn't think about?
- **In what ways did you build your social capital at this meeting**? Did you make any connections? Get access to any other resources?

PLEASE REMEMBER TO BRING YOUR COMPLETED HOMEWORK TO THE NEXT SESSION.

Part 1: Please list below every meeting you attended between January 26 and February 21 that was related to disability issues or making change happen in the disabilities movement.

Meeting	Meeting Purpose

Part 2. Your reflections about these meetings.

For two of these meetings, reflect on how much you saw the concepts we talked about in action. Write your reflections to each of the questions listed below.

Meeting 1: ____

Reflections:

1. **What type of leadership style did the meeting leader use?** For example, were they a bear, buffalo, deer or eagle?

   How could you tell? (If you were the meeting leader, reflect on your own style.)

2. **Was this an effective style for this group**? Why or why not?

3. **How might the meeting have benefited from systems thinking?** Were there any interdependencies, feedback processes, time delays, leverage points, for example, that participants didn't think about?

4. **In what ways did you build your social capital at this meeting**? Did you make any connections? Get access to any other resources?

Meeting 2: ____

Reflections:

1. **What type of leadership style did the meeting leader use?** For example, were they a bear, buffalo, deer or eagle?

   How could you tell? (If you were the meeting leader, reflect on your own style.)

2. **Was this an effective style for this group**? Why or why not?

3. **How might the meeting have benefited from systems thinking?** Were there any interdependencies, feedback processes, time delays, leverage points, for example, that participants didn't think about?

4. **In what ways did you build your social capital at this meeting**? Did you make any connections? Get access to any other resources?

BAD-L

Second Training Session

- Systems Thinking: Part II
- Social Capital: Part II
- Community Project
- Proud and Powerful
- Emerging/Seasoned Leader Relationships
- Evaluation and Wrap Up

"Injustice anywhere is a threat to justice everywhere!"
~ Martin Luther King, Jr.

Second Training Session

Participants will arrive with a topic and goal. In addition, they now have experience talking and listening to each other, attending community meetings, and creating network maps.

Welcome and Introductions

(30 minutes)

Go around the room and have each participant state their name, and address these questions:

1. Were you able to go to a meeting?, If yes, what meeting, If no why?
2. In what ways did you keep yourself accountable to the work of BAD-L?

The facilitator(s)' introduction would be their name and a brief summary of evaluations of the last session and how things have changed based on the responses.

Session # 1 Key Concepts and Tools

(20 minutes)

It is important to review the materials, concepts, and knowledge presented in the previous sessions to help participants ready themselves for the day. Have participants individually review the handouts in their binders.

Next, have participants divide into small groups of four that have both emerging and seasoned leaders (not necessarily assigned pairs). In these groups they are to discuss the key concepts, where they used them, or might have used them, and when they want to remember to use them in the future.

After time for discussion, have them return to the large group to report on back key ideas of their discussion. We do not need to hear from everyone, but enough to create a discussion at the larger group level.

Systems Thinking: Part II

(60 minutes)

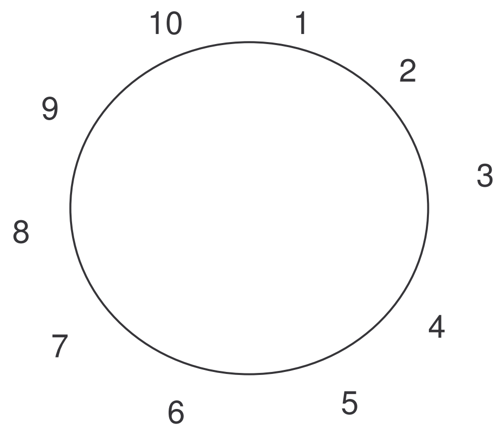
Triangle Activity

Source: The Systems Thinking Playbook – Exercises to stretch and build learning and systems thinking capabilities by Linda Booth Sweeney and Dennis Meadows (ISBN 0-9666127-7-9).

Purpose: To help participants learn the characteristics in action.

Materials: Chart paper, adhesive name tags, masking tape, markers.

Directions: Prior to the start of the activity, prepare one self-sticking tag for each participant. Number the tags #1 to your # of participants. Prepare an "influence diagram" on chart paper. Draw a circle and place numbers (representing the # or participants) around the outside of the circle.



Next, activate participants' thinking by reading: "Take a minute to remember a time when you wanted something to happen. You made a plan and followed it, but in the end, the result you were counting on did not happen. Something else did."

Now, distribute numbered tags to each participant. Have each participant stand in a large circle, facing each other. The facilitator should say, "Look around the circle and in your head pick two people. Do not say their names aloud, look at them, or give any clues about who you picked. When I give the signal, I want you to try and position yourself equidistant between the two people that you picked…and maintain that position until I tell you to stop."

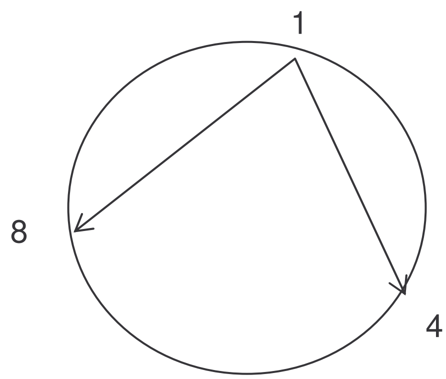
(Physically model what you mean. Explicitly tell them that "equidistant" means an equal distance away from the two selected people. Have three people stand in a few different arrangements and ask participants each time, "Are the people equidistant from each other?" Help them notice that it doesn't have to be on a straight line, and that there are many equidistant points.)

Give the signal to begin. You should see constant movement as people continually change their positions in order to attempt maintaining equidistance. If you don't see this, stop the group have them tell you their assignment. Clarify misunderstandings.

Once things are going as they should, be sure to allow enough time for people to show some signs of frustration before you tell the group to stop. (This will usually exhibit itself as laughter, comments about wanting people to stop moving, etc. If the movement seems to come to a stop, be sure and wait a few seconds more. It will usually begin to move again.

When you feel people have had adequate opportunity to experience the behavior of this system, and its interdependencies, tell them to stop. Have everyone sit where they can see the influence chart.

Debrief
Complete the influence chart: Have the participant wearing Tag # 1 name the two people he/she selected. Place the participant's name beside # 1, the selected names beside their numbers, and draw two arrows from # 1 to the other two numbers. It would look like this:



Repeat for each participant in the circle.

Set the influence aside for now. (Complete it immediately after so nobody forgets their experience, but consider other questions first.)

Ask questions:

- What happened?
- What made that happen?
- How did it feel?

As participants respond, jot main ideas on chart paper. Probe responses by asking follow-up questions when appropriate. For instance:

If I took a picture of you doing this activity and showed it to someone, would they be able to understand what was going on, how this activity worked? Why/not?

Exploring this can lead to BEHAVIOR OVER TIME: To understand a system you have to watch it over time (like a movie) not just look at an event (snapshot).

What happened each time someone moved? And, then what? – and then what?

Systems are made up of **INTERDEPENDENT PARTS**. Changes in one part affect other parts. When an **EFFECT** of one action becomes a **CAUSE** of another one, we call this **FEEDBACK**.

What created the behavior we saw? What could have made the behavior different?

The rules I gave you … the choices you made… **STRUCTURE GENERATES BEHAVIOR –** structure might be rules, procedures, relationships, peoples' ways of thinking, physical conditions. To get a different pattern of movement, the "way it was set up" would have to change.

Would just any change give us different behavior? Would we have seen the same behavior without the people? Without the rules? Without the wastebasket? If people were wearing different clothes? If we were outdoors?

Systems have **BOUNDARIES –** In this case, rules and people are required to produce this system. Everything else could change without affecting the outcome. (ie, different arrows, but the same phenomenon of not being able to quite settle).

Look at the Influence Chart. Ask "What can we say about the amount of influences different people had on movement in the system? Did everyone have the same influence? Why? Why not? Jot more notes: **LEVERAGE** means that different parts of the system have different amounts of influence on the system. When we want to change a system, its good to be able to figure out which parts will have the greatest impact if changed.

Summary
When you want to identify whether something is a "system" you can test it with these three questions:

- Which parts are needed to produce the behavior of this system?
- In what ways are the parts interdependent?
- What changes do I see when I watch this system over time? (How long would I have to watch it to see it work? What misunderstandings might someone have who observed it for a shorter period of time?)

SOCIAL CAPITAL: PART II

(40 minutes)

In a large group, ask participants to brainstorm a list of the kinds of support any leader might need, who, are the kinds of people that might offer the kinds of support needed.

Next, refer participants to their binders to create a beginning Social Networking Map by completing steps 1 – 3. If you did this as "homework" review your map and add more people to your network.
Individuals have all kinds of people and resources in their social networks. Part of becoming an effective leader is realizing who you have in your network and who else you need to create linkages with to create the changes you are targeting.

As a first step in understanding your own social network, we would like you to create a "picture" of the people and organizations that you can rely on as a leader. To create this picture, follow the steps below:

Step 1: *Who is in your support network*: On the left column of the first sheet, list **all of the people and organizations that you can count on to support you** in your work as leader in the disabilities movement.

Don't Forget:

- Family
- Friends and their family members
- Groups you are connected to
- Specific members of the groups that hold some kind of position in the world
- Volunteer connections
- Job connections
- Faith community connections

Step 2: *Who are they*? Identify who each person is in your network in the right column on the same page. Circle if they are a family member, friend, co-worker/neighbor, or another leader. Feel free to circle more than one thing for each person.

Step 3: *What kinds of support do you get?* Think about how each person supports you as a leader. Place each person in the "support corner" they belong to on page 4 by writing their name in the corner they belong to. Each person's name can be written in more than one corner (if they provide you with more than one type of support). . Here are some descriptions of the four support corners:

<u>Emotional Support</u>: Cheers you along when you are facing challenges, helps make you feel better about your efforts, helps you realize what a great leader you are.

<u>Provides Resources</u>: Offers the resources you need to be a leader, like transportation to a meeting, access to a phone, access to a list of people to call, $$$ to support some cause.

<u>Gives Information</u>: Answers questions you might have; gives you information to help you take action or figure out what to do; helps you solve dilemmas you are facing, links you to other information sources.

<u>Takes Action</u>: Is willing to work side by side with you to make change happen; will attend meetings, march, or write letters, if needed.
Step 3: *What does your network picture tell you?* Look as your network picture and ask yourself the following questions:

Next, ask participants to get in emerging/seasoned leader pairs and complete step #4 together. When finished, offer ideas to each other about who to add to the map. This might be possible introductions of people you know, and / or names of people to contact.

Step 4: *Reflecting on your network*. Now, take a step back and look at your network. What does it tell you? Here are some questions to think about?

3. Do you have enough diversity in your network? For example, are they all family members? Are you connected to any other leaders?
4. Are you getting the kinds of support you need to be an effective leader? For example, do you have people in your network you can depend upon to take action with you?

As a conclusion, explain that at various times during your participation in BAD-L we may ask you to make another map. We also encourage you to add to map as you make connections with people who will help in your project goals. Finally, as a large group, discuss any key concepts from the list reviewed earlier today were present in this exercise.

COMMUNITY PROJECTS

(15 minutes)

We want each team to discuss the interests of the mentee, and from that discussion, identify something you wish to impact in the community of your choice. The project might relate to people with disabilities only, people with disabilities and others, or to your neighborhood, town, or country.

Today and in the following training sessions we will offer you methods and tools that will support your ability to strategize and implement a successful project.

The project should be small enough to make visible progress in six months to a year.

Your project should be structured to recruit others who are interested in the outcome. It should not be something you do with your seasoned leader alone, but something that demands organizing a group of people toward an agreed upon goal.

How you go about your project is as important as what you do. This is a learning experience, a time to practice the skills you learn at BAD-L, and most importantly an opportunity to expand your social network by making good connections with each other and with others in your community and in position to make a difference.

Community Project Activity

Refer participants to the community project handout in their binders. Ask them to spend time individually reviewing the handout.

As a large group, pose and discuss burning questions. If time does not allow, ask participants to review the sheet and send any questions they have to the group using the preferred communication method discussed in the first training session.

PROUD AND POWERFUL

(30 minutes)

Proud and Powerful Expressions

Source: Michigan Disability Rights Coalition

Purpose: There are many ways of expressing our pride and power. This can be in the form of writing, art, video, poetry, stories, etc. Not everyone shows their pride and power in the same way. This activity explores the different forms of expression and the many feelings that can be evoked by viewing these expressions.

Materials: Laura Hershy's poem and many other different forms of proud and powerful expression. (See materials at the end of this section for the poem and examples of expressions.)

Directions: Prior to participants arriving, place several expressions of disability pride and power around the room. Begin by asking participants to pay attention to their reactions to the activities about to take place. Then, ask participants to refrain from talking during this activity. Next, read Laura Hershey's Poem titled, "You Get Proud by Practicing". Next, show the video of the disability pride parade - http://www.disabilityprideparade.com/. After the video, have participants do a "gallery walk" around the room to view the various expressions.

Once everyone has had a chance to view the different forms of expression, have participants get into small groups and discuss the following:

- What emotions came up for you as you heard the poem and viewed the different forms of expression?
- What surprised you? Why?
- What most resonated with you? Why?
- What images, etc. spoke to you regarding "pride" and "power?"

Depending on time, have the small groups report back to the large group.

Invitation for Expression

As we have seen, there are several forms of expressing pride and power. Some are rather bold and public expressions, while others are quite private such as the poem. Each of us in the room is at a different place in understanding and claiming our pride and power.

Invite participants to begin thinking about how they have shown their pride and power before or might express their pride and power in the future. *If applicable, refer to the guidelines about challenging ourselves.* Ask participants to bring an example of how they express pride and power to the last training.

EMERGING/SEASONED LEADER BREAK OUT SESSION

(60 minutes)

Have the participants break into two groups for the next hour. The seasoned leaders will discuss the process of a root cause analysis. Emerging leaders will learn about action plans.

Root Cause Analysis – Seasoned Leader Group

Begin by the facilitator(s) telling the story of the 5 whys ending with the following idea:

Too often we identify a problem and go right to action without fully understanding the issue and where it comes from. If we stop to think through what causes the problem we might be able to find a simple solution, we might be able to find others who want to help solve the problem, or we might be able to find a solution that would solve a number of problems.

Action Plans – Emerging Leader Group

<u>What is an Action Plan</u>

Refer participants to the action plan section of their binders so they can follow along. Facilitators may also want to have a copy of the action plan section to use in explaining the steps and to refer to the form.

Begin by explaining what an action plan is and why it is important in leadership. Action plans are problem-solving tools – roadmaps to creating change and ultimately getting what we want. There are several formulas for creating action plans. Today, participants will learn about one method of creating an action plan which involves 10 steps.

Step 1: Define the Problem

It is helpful to write out a short statement of the problem. This helps you think about what you need to change and can be a helpful reminder if you get stuck or side tracked later in the process. To help you define the problem, ask yourself the following questions:

- How do you know there is a problem?
- How do you feel about the problem?
- Who is affected by the problem?
- When did the problem start? Is it worse at different times?
- What has been done to fix the problem so far? What happened as a result of this? Should this be continued or does something else need to be tried?

Some situations may involve several problems. If so, it is important to list each problem because they may need different advocacy plans. If you have more than one problem, we suggest that you work on the most important problem first.

REMINDER: The "why" of the problem (why it exists) is the root cause.

Step 2: Define the Goal

It is important to be specific when you are saying what you want. A good rule of thumb is to be able to say what your goal is in one sentence. Here are some questions to help you define your goal:

- What do you want?
- What do you want to happen?
- Is your goal something you can get?

If you do not know what your goal is, talk to friends, family members, and other people who know you and your life. They may be able to give you ideas.

It is important to make sure your goal represents the change you really want to make. It is also important to have a goal that is realistic – one that you can accomplish.

Step 3: Identify Allies
Allies are people or organizations that can help you get what you want. They often agree with your goal or what you want. They may be friends and family or they may be people who can support you in making things happen such as policy makers, professionals, and advocates. Here are some questions to help you figure out who your allies are:

- Who agrees with my goal?
- Who will support me?
- Who can I call on when things get hard?
- Who knows a lot of information about my goal?

Step 4: Gather Information
After you have identified the problem and thought out your goal, you want to gather all the information you need to be able to get what you want. Here are some questions to help you gather information:

- What do you need to learn about the barriers?
- Who can help you solve the problem?
- Who is in charge of the problem you want to solve?
- What laws are involved with this problem?
- What agencies are involved?
- Who should you talk to at the agencies involved?
- What laws, rules, or policies will support what you want?

It may be helpful to make two lists – one with the information you already have and one with the information you still need to get. When listing information you already have, review notes from any conversations you have had about the problem and/or goal. You can also review materials you got in the gathering information stage. When listing the information you still need to get, think about any information that will help show that the goal you want is needed.

Step 5: Define the Barriers

Barriers are problems that are keeping you from getting what you want. They are things that stand in the way of getting your goal. Here are some questions to help you decide what barriers are keeping you from getting what you want:

- What are the barriers?
- What is stopping you from getting what you want?
- Why are the barriers there?
- Who are the people stopping you from getting what you want?
- What policies are stopping you from getting what you want? Can they be changed?
- What programs are stopping you from getting what you want? Can they be changed?

Sometimes the barriers are people. When this is the case, it is helpful to put yourself in their shoes. Think about what their needs are. What arguments do you expect them to make? You may want to write these arguments on your action plan and think about what you will say or do in response to these arguments. Write down your ideas about how you will respond.

Step 6: Define the Target
The target is the person who has the power to give you what you are asking for. It is never an institution or elected body. It may seem like it is an organization, but the target is the person within that organization who has the power to make the change. To help you identify the target, ask yourself:

- Who is the person who has the power to give you what you want?
- What power do you have over them?
- What does this person think about what you want?
- Are they resistant to change? If so, why?

In some cases there are secondary targets. A secondary target is the individual who has power over the person who can give you what you want. When identifying the secondary target, ask yourself:

- Who has power over the person with the power to give you want you want?
- What power do you have over them?
- What does this person think about what you want?
- Are they resistant to change? If so, why?

Step 7: Identify possible solutions
Solutions are ways that you can solve a problem. Here are some questions to help you think of solutions:

- What are all the ways you can get past the barriers?
- Which solutions are the best choices for you?

- How can you solve the problems that are keeping you from getting what you want?

It is important to remember that you may not always get exactly what you want. You may have to negotiate. It is helpful to write down alternative solutions in case you do not get exactly what you want.

Step 8: Develop Action Steps
Action steps are specific things you will do to get what you want and make the solutions happen. This includes a plan for how you will approach the other party and argue your point of view. This may involve telephone calls, writing letters, having meetings, and more. Here are some questions to get you thinking about action steps:

- How can you make the solutions happen?
- Who should you talk to?
- What do you need to do to get what you want?
- Do you know what you need to do?
- Who is the focus of your action steps?

When you are writing down each step, write the date that you want to take each step. These dates are not set in stone, but can help you keep your sense of purpose and direction. Whenever you are requesting something from another person like a meeting, a copy of a policy, or anything that needs a response from the person, tell them a specific date you want to hear back from them by. Two weeks is a good amount of time to give them.

It is also a good idea to note down any other information, material, or support you will need to complete each step.

Finally, think about what you will do if your plan is not successful. There are almost always other steps you can take to help get what you want.

Step 9: ACTION
This is when you actually DO the steps in the action plan.

Step 10: Follow-up
It is important that you keep track of what is happening with your action plan. You want to know what you have done, what you are waiting on, and what still needs to be done. Here are some ways to do this:

- Keep copies of all the letters you send
- Keep a record of all the phone calls you make (see sample telephone record)
- Write down when you talk to someone make notes about the conversation such as the date you made the call, who you spoke with, what you talked about, etc. (see sample discussion notes form)

- If you write a letter to someone, decide when you think you should expect an answer, and put that date in the letter
- If you do not get an answer, think about what to do next, and then do it.

Answer any questions about action plans. Then explain that their homework is to complete an action plan with their emerging/seasoned leader about the issue they have chosen for their community project.

EMERGING/SEASONED LEADER RELATIONSHIP

(90 minutes)

There are several signs that the emerging/seasoned leader relationship is effective including:

- Mutual Agreement – This can be around the topics of leadership, strategies for change, who to contact, short and long term goals, etc.
- Mutual Teaching/Learning – This is evident when both the seasoned leaders and emerging leaders are teaching each other as well as learning from each other.
- Strong Emotional Bond – When there is a mutual like, trust, and appreciation for each other.

Research tells us that good emerging/seasoned leader relationships and working alliances have the following characteristics:

- Ability to create a safe environment
- Take risk through personal disclosure
- Partnership
- Collaboration
- Pervading support
- Guidance
- Constructive criticism
- Genuineness
- Reliability
- Accountability
- Reflective honesty
- Professionalism
- Developing a friendship
- Fostering independence and empowerment
- Developing and maintaining appropriate boundaries (to monitor control)
- Challenging though supportive confrontation

Ask participants to get into their emerging/seasoned leader pairs and discuss what the key characteristics might mean to their partnership. Ask each pair to set up a contract for how they want to practice these characteristics.

Next, have the pairs present their contracts to the large group.

Now ask them to divide into seasoned and emerging leader groups. In their groups, have them brainstorm the biggest challenges that they see arising. *This activity works best if the emerging and seasoned leaders are in different rooms.*

In addition, ask the seasoned leaders to discuss the following concepts:

- Letting go/stepping back
- Avoid cloning themselves
- Active listening
- Ask questions – do not dismiss ideas
- Bringing up topics when they are not solicited.
- Dealing with failure
- Coaching

Have the seasoned leaders conclude with a key message to the emerging leaders. Select a spokesperson to report back in the large group.

Have the emerging leaders discuss the following concepts:

- What it means to be new or a youth in the movement
- How to make your voice heard
- Developing self-worth and self-confidence
- Learning from others, but not just following others
- How to respond to differences of opinion
- Critique not criticism

Have the emerging leaders conclude with a key message to seasoned leaders. Select a spokesperson to report back to the large group.

Finally, bring everyone back to the large group and share their key messages. Next have a verbal reflection using the two reflection questions: 1) How do you feel? 2) What does it mean? *Be sure to hear from the emerging leaders first, followed by the seasoned leaders.*

EVALUATION AND WRAP UP

(30 minutes)

Summarize what participants learned today and key themes that emerged. Spend time answering questions the participants may have.

Give participants 10 minutes to write in their journals reflecting on the day. Ask participants if they can recall the reflection questions. If not, remind them:

- What just happened?
- How did it make you feel?
- What does it mean?
- What would you do differently?

Give participants 5-10 minutes to complete a written evaluation of this training session. *Be prepared to assist people with reading, writing, etc. if necessary.*

As a group, discuss the following questions:

- What did you like about the past two days?
- What didn't you like?
- What worked well?
- What would you change and how?

Remind them of the next training date, location, time, and anything they need to do between the sessions.

Homework:

- Proud and powerful expression.
- As a pair, complete action plan for community project.
- Seasoned leaders should introduce the root cause analysis to emerging leaders.
- Continue to expand your social network map and write new names onto your existing map.
- Reflect on process as a leader and their personal goals (learning, connecting, leading, action) in their journals.

Second Training Session Activities and Binder Materials

- **Activities**
    - Triangle Activity
    - Proud and Powerful Expressions
- **Binder Materials**
    - Key Concepts and Tools
    - Characteristics of a System
    - Social Capital Networking
    - Community Project Handout
    - The Five Whys
    - Action Plans

"Leadership is practiced not so much in words
as in attitude and in actions."
~ Harold S. Geneen

KEY CONCEPTS AND TOOLS FOR LEADERS
(from BAD-L Session # 1)

Three Components of Leadership
As you develop your own leadership and support others to develop their leadership, be aware of where you are strong and where you want to work more.

Self – Participate in activities that increase your self-esteem, self-confidence, and self-awareness.
Community – Work on developing relationships with every person you are in contact with. Discover how to motivate yourself and others to be accountable to the group, to have a voice, to listen well to others, to include everyone, to work as a team, and to use conflict as a positive force in your team. Practice being a follower as much as you practice being a leader.
Visionary – Learn to listen to your community. Find ways to identify and speak truth to power. Use stories, metaphors, literature, and your own words to form a strong message.

Leadership and Followership

Leadership skills can be used when you are in the role of a follower. Developing relationships with others, noticing what people are saying in order to form a message, being aware of the effect you have on another person or the group are skills learned in community, in creating a vision, and in strengthening your sense of self. You take and use the leadership skills in whatever role you are in at any given moment.

By fully supporting a proposal by the leader of a group, a follower can influence decisions in a very important way. It is much more powerful to hear a proposal and say, “That is a terrific idea”; than it is to say “whatever” or “I don’t care”.

Identifying Generic Themes
(We used this at the end of the exercise where we interviewed each other)
When finding the themes any data - whether in conversations, surveys, forums, stories, experiences ask the following questions:

1. What was do you find in common?
2. What didn’t fit into the commonalities?
3. What surprised you about the data?
4. What did you expect to see or hear in the data but, didn’t?

Sometimes it is the answers to numbers 2 – 4 that gives you clues to your next steps.
Reflection Questions:
These questions can be used in our work, in our relationships, and in our individual life experiences. They help us learn and grow. They can be used in our journaling, in our quite time, and in our relationships.

1. What just happened?
2. How do I feel?
3. What does it mean? (ask this question many times, you often find many meanings)
4. What would I do differently?

Ladder of Inference
The Ladder of Inference describes the thinking process of individuals between the moment something is experienced and the moment action is taken. If we can become aware of our own thinking patterns and curious about the thinking patterns of others, we can move to a <u>truly shared understanding.</u>

1.) Imagine a video tape of an event.
2.) Notice what part you pay attention to
3.) Be aware of how your filter this information through your own experience and or culture.
4) What are your personal assumptions?
5) What are the conclusions you draw from those assumptions?
6) What are your beliefs about the world?
7) What action are you taking from those beliefs?

TRIANGLE ACTIVITY

Source: The Systems Thinking Playbook – Exercises to stretch and build learning and systems thinking capabilities by Linda Booth Sweeney and Dennis Meadows (ISBN 0-9666127-7-9).

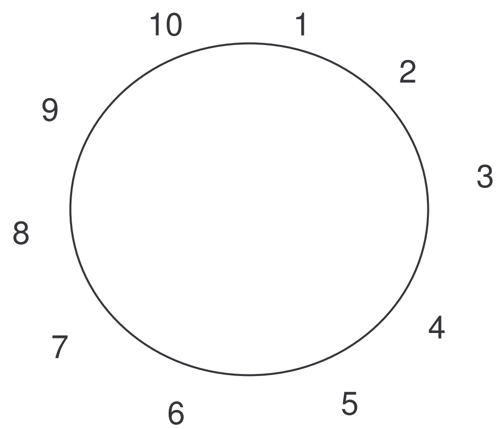
Purpose: To help participants learn the characteristics in action.

Materials: Chart paper, adhesive name tags, masking tape, markers.

Materials

- ✓ Chart paper
- ✓ Adhesive name tags
- ✓ Masking tape
- ✓ Markers

Directions: Prior to the start of the activity, prepare one self-sticking tag for each participant. Number the tags #1 to your # of participants. Prepare an "influence diagram" on chart paper. Draw a circle and place numbers (representing the # or participants) around the outside of the circle.



Next, activate participants' thinking by reading: "Take a minute to remember a time when you wanted something to happen. You made a plan and followed it, but in the end, the result you were counting on did not happen. Something else did."

Now, distribute numbered tags to each participant. Have each participant stand in a large circle, facing each other. The facilitator should say, "Look around the circle and in your head pick two people. Do not say their names aloud, look at them, or give any clues about who you picked. When I give the signal, I want you to try and position yourself equidistant between the two people that you picked…and maintain that position until I tell you to stop."

(Physically model what you mean. Explicitly tell them that "equidistant" means an equal distance away from the two selected people. Have three people stand in a few different arrangements and ask participants each time, "Are the people equidistant from each other?"

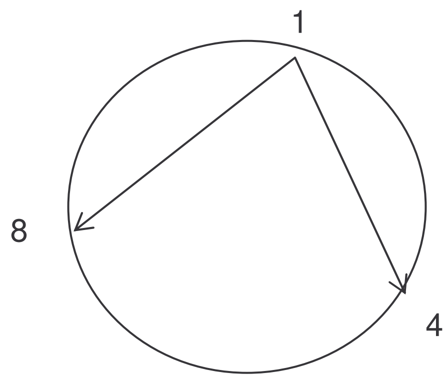
Help them notice that it doesn't have to be on a straight line, and that there are many equidistant points.)

Give the signal to begin. You should see constant movement as people continually change their positions in order to attempt maintaining equidistance. If you don't see this, stop the group have them tell you their assignment. Clarify misunderstandings.

Once things are going as they should, be sure to allow enough time for people to show some signs of frustration before you tell the group to stop. (This will usually exhibit itself as laughter, comments about wanting people to stop moving, etc. If the movement seems to come to a stop, be sure and wait a few seconds more. It will usually begin to move again.

When you feel people have had adequate opportunity to experience the behavior of this system, and its interdependencies, tell them to stop. Have everyone sit where they can see the influence chart.

Debrief
Complete the influence chart: Have the participant wearing Tag # 1 name the two people he/she selected. Place the participant's name beside # 1, the selected names beside their numbers, and draw two arrows from # 1 to the other two numbers. It would look like this:



Repeat for each participant in the circle.

Set the influence aside for now. (Complete it immediately after so nobody forgets their experience, but consider other questions first.)

Ask questions:
- What happened?
- What made that happen?
- How did it feel?

Characteristics of a System

All systems, everywhere, have some same general characteristics. If you come to understand the following terms and ideas you will be able to understand systems and system's change.

These characteristics include:

- **Change over time –** the behavior of the system changes as time passes.
- **Interdependence** – the elements of a system affect each other; the nature of the system is defined by the effects of the interdependencies, not just by the elements themselves.
- **Feedback –** an "effect" of the system re-entering the system as a "cause".
- **Leverage –** considering where changes can lead to significant, lasting improvements.
- **Structure generates behavior –** the way that things are organized creates the behavior we see.
- **Delays** – time lags between actions and effects, and between effects and actions.
- **Boundaries –** definition of all that is required to produce the behavior of the system and elimination of all else.

PROUD AND POWERFUL EXPRESSIONS

Source: Michigan Disability Rights Coalition

Purpose: There are many ways of expressing our pride and power. This can be in the form of writing, art, video, poetry, stories, etc. Not everyone shows their pride and power in the same way. This activity explores the different forms of expression and the many feelings that can be evoked by viewing these expressions.

Materials

- ✓ Laura Hershey's poem (next page)
- ✓ Any other forms of proud and powerful expression

Directions: Begin by talking about the many forms of expressing our pride and power. Then ask participants to refrain from talking during this activity. Next, read Laura Hershey's Poem titled, "You Get Proud by Practicing". Pass around pictures, items, etc. or have them on display where everyone can view them.

Once everyone has had a chance to view the different forms of expression, discuss the following questions as a large group:

- What emotions came up for you as you heard the poem and viewed the different forms of expression?
- What surprised you? Why?
- What most resonated with you? Why?

You Get Proud by Practicing

by Laura Hershey

If you are not proud
For who you are, for what you say, for how you look;
If every time you stop
To think of yourself, you do not see yourself glowing
With golden light; do not, therefore, give up on yourself.
You can get proud.

You do not need
A better body, a purer spirit, or a Ph.D.
To be proud.
You do not need
A lot of money, a handsome boyfriend, or a nice car.
You do not need
To be able to walk, or see, or hear,
Or use big, complicated words,
Or do any of those things that you just can't do
To be proud. A caseworker
Cannot make you proud,
Or a doctor.
You only need more practice.
You get proud by practicing.

There are many many ways to get proud.
You can try riding a horse, or skiing on one leg,
Or playing guitar,
And do well or not so well,
And be glad you tried
Either way.
You can show
Something you've made
To someone you respect
And be happy with it no matter
What they say.
You can say
What you think, though you know
Other people do not think the same way, and you can
keep saying it, even if they tell you
You are crazy.

You can add your voice
All night to the voices
Of a hundred and fifty others

In a circle
Around a jailhouse
Where your brothers and sisters are being held
For blocking buses with no lifts,
Or you can be one of the ones
Inside the jailhouse,
Knowing of the circle outside.
You can speak your love
To a friend
Without fear.
You can find someone who will listen to you
Without judging you or doubting you or being
Afraid of you
And let you hear yourself perhaps
For the very first time.
These are all ways
Of getting proud.
None of them
Are easy, but all of them
Are possible. You can do all of these things,
Or just one of them again and again.
You get proud
By practicing.

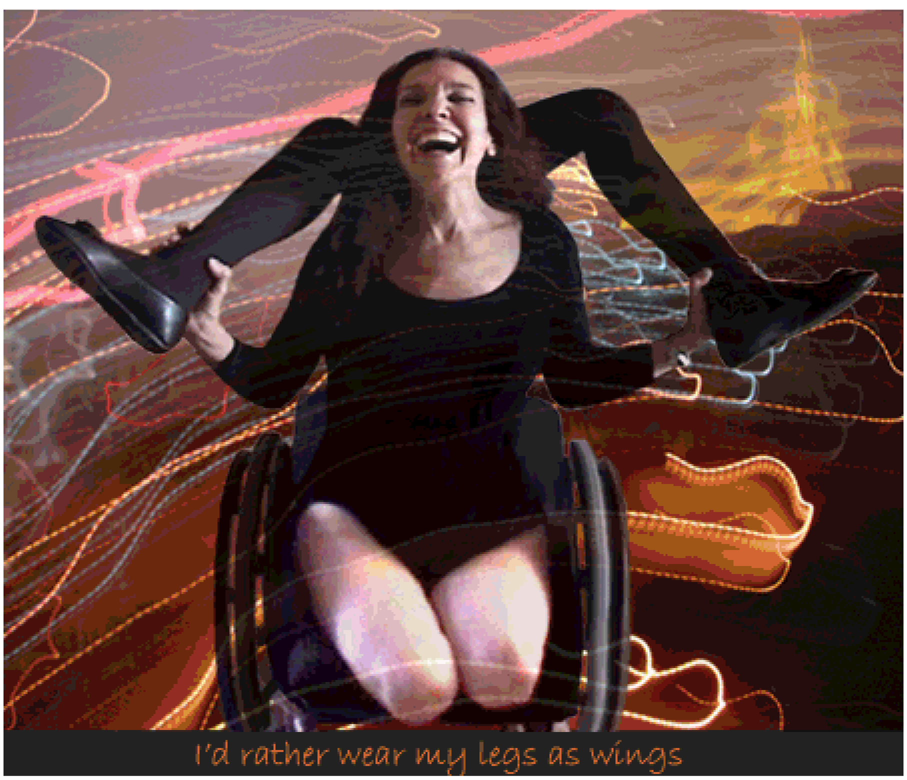
Power makes you proud, and power
Comes in many fine forms
Supple and rich as butterfly wings.
It is music
when you practice opening your mouth
And liking what you hear
Because it is the sound of your own
True voice.

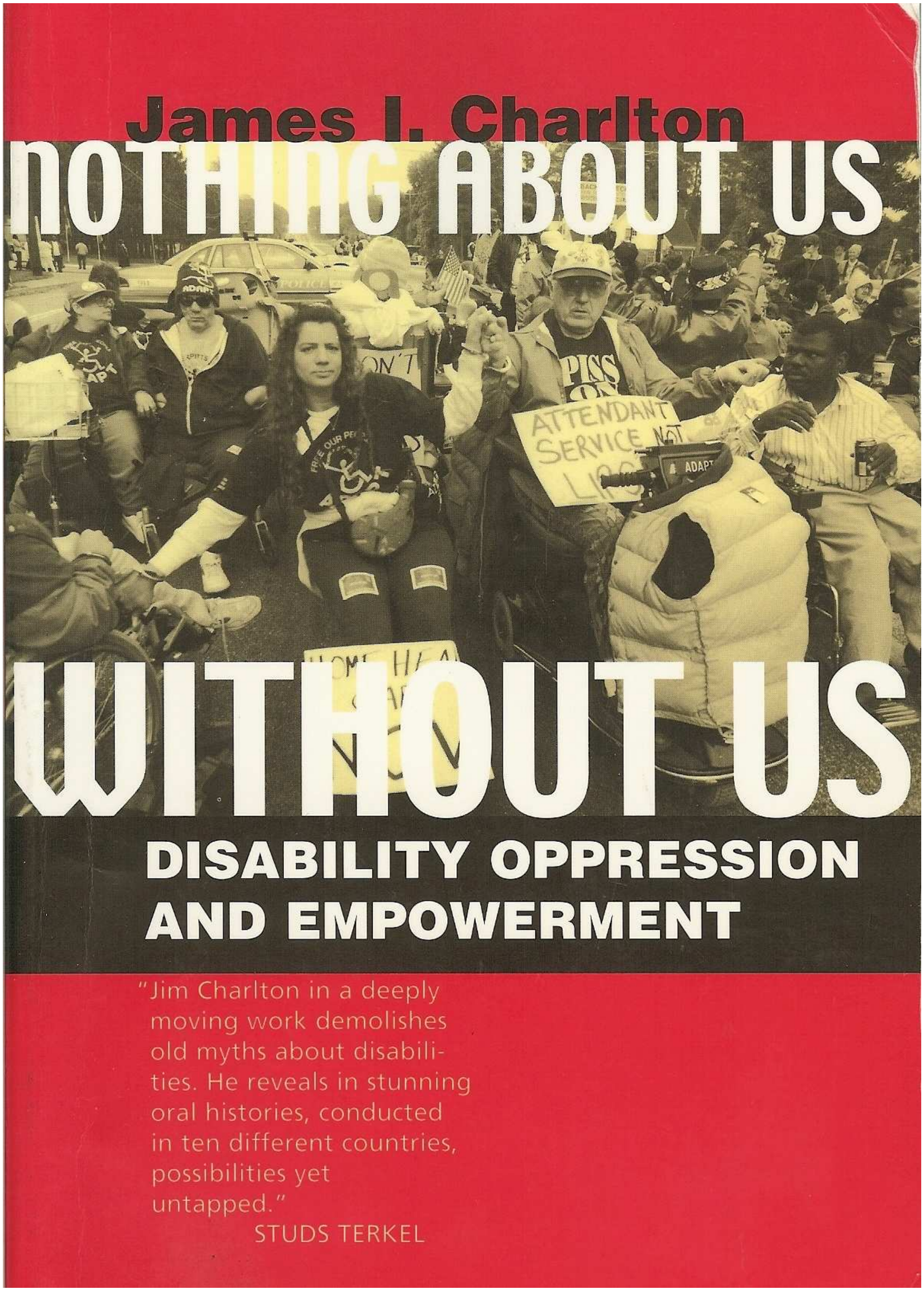
It is sunlight
Wen you practice seeing
Strength and beauty in everyone,
Including yourself.
It is dance
when you practice knowing
That what you do
And the way you do it
Is the right way for you
And cannot be called wrong.
All these hold
More power than weapons or money
Or lies.

All these practices bring power, and power
Makes you proud.
You get proud
By practicing.

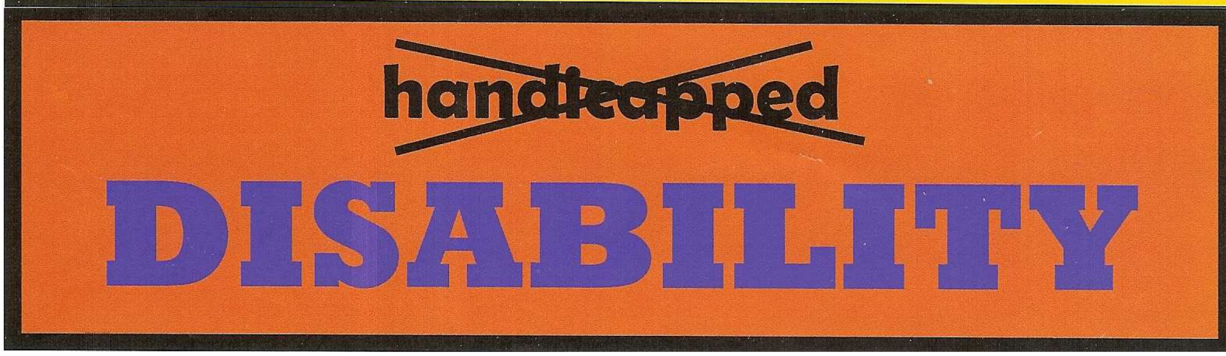
Remember, you weren't the one
Who made you ashamed,
But you are the one
Who can make you proud.
Just practice,
Practice until you get proud, and once you are proud,
Keep practicing so you won't forget.
You get proud
By practicing.

Examples of Proud and Powerful Expressions




James I. Charlton
NOTHING ABOUT US WITHOUT US
DISABILITY OPPRESSION AND EMPOWERMENT
"Jim Charlton in a deeply moving work demolishes old myths about disabilities. He reveals in stunning oral histories, conducted in ten different countries, possibilities yet untapped."
STUDS TERKEL
ATTENDANT SERVICE NOT
ADAPT


GOT GIMP?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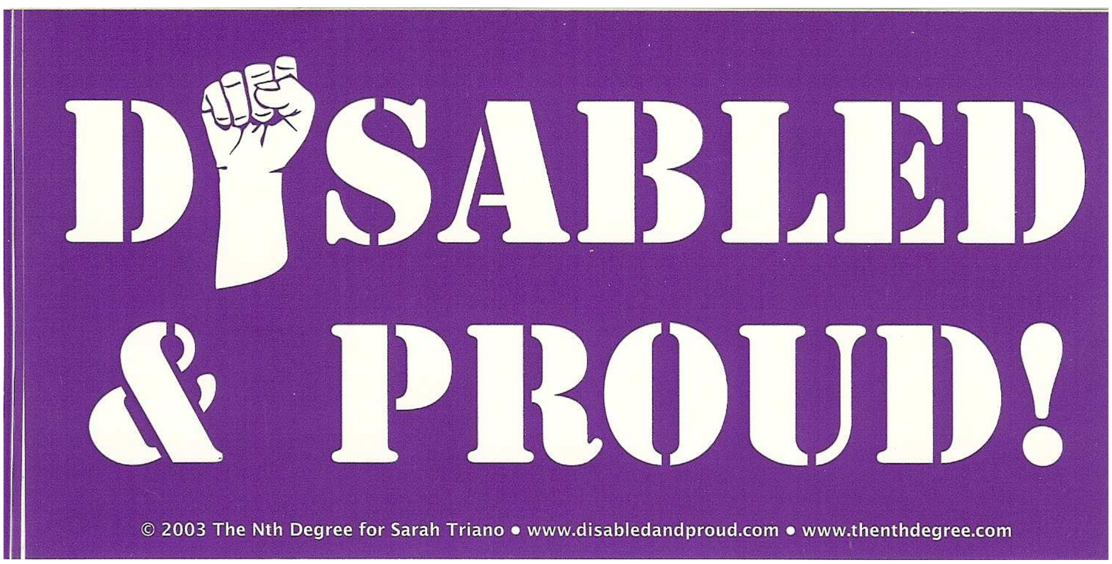
DISABILITY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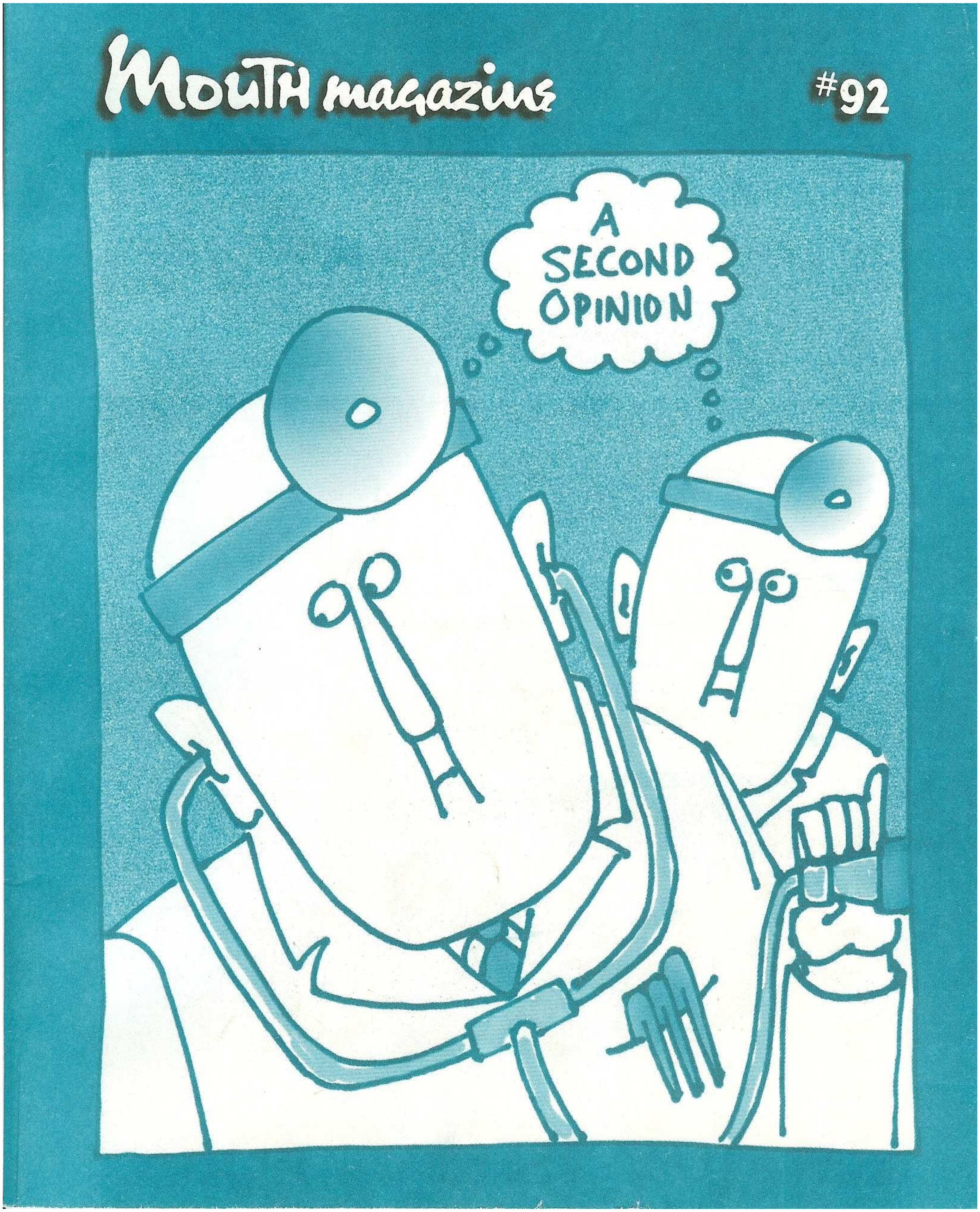
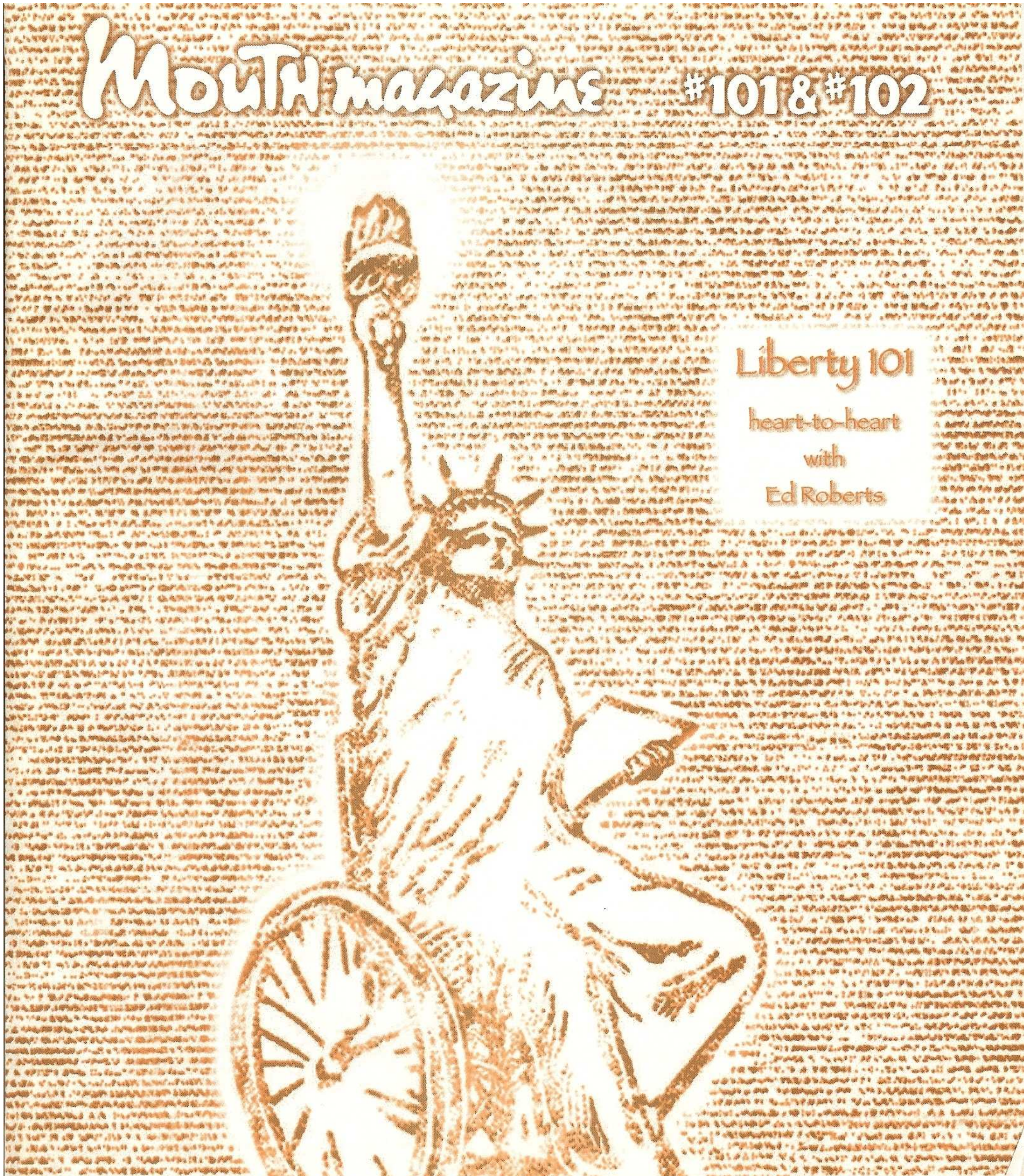
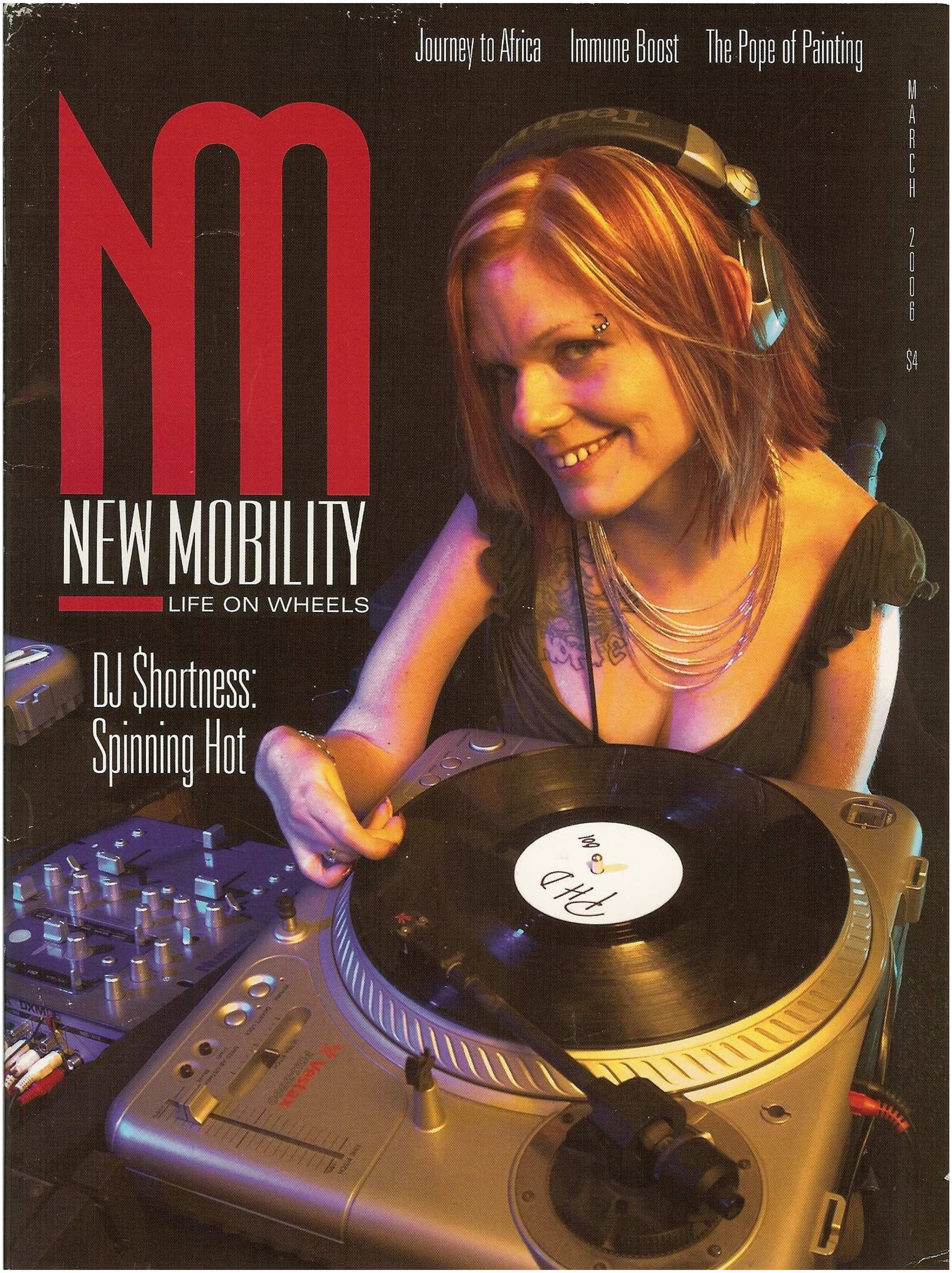
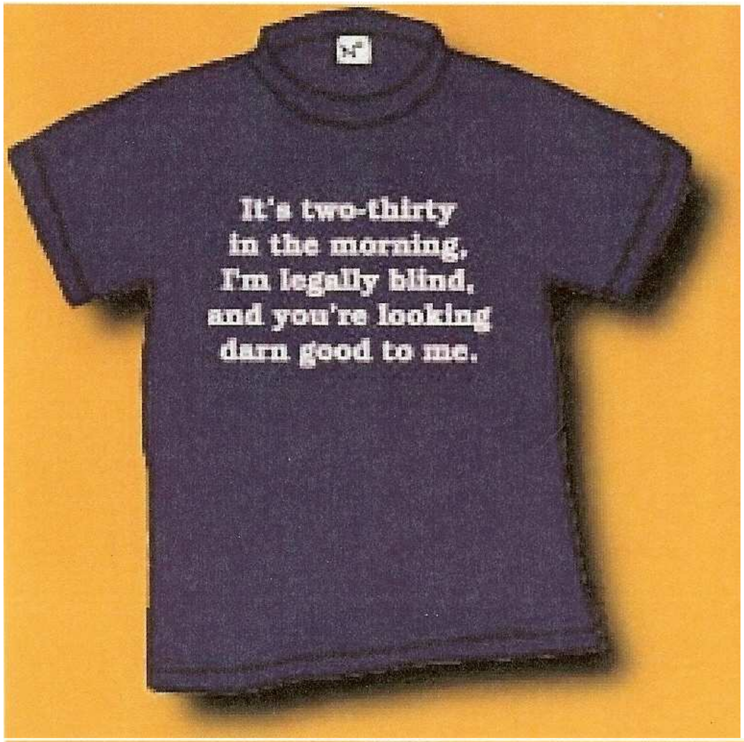
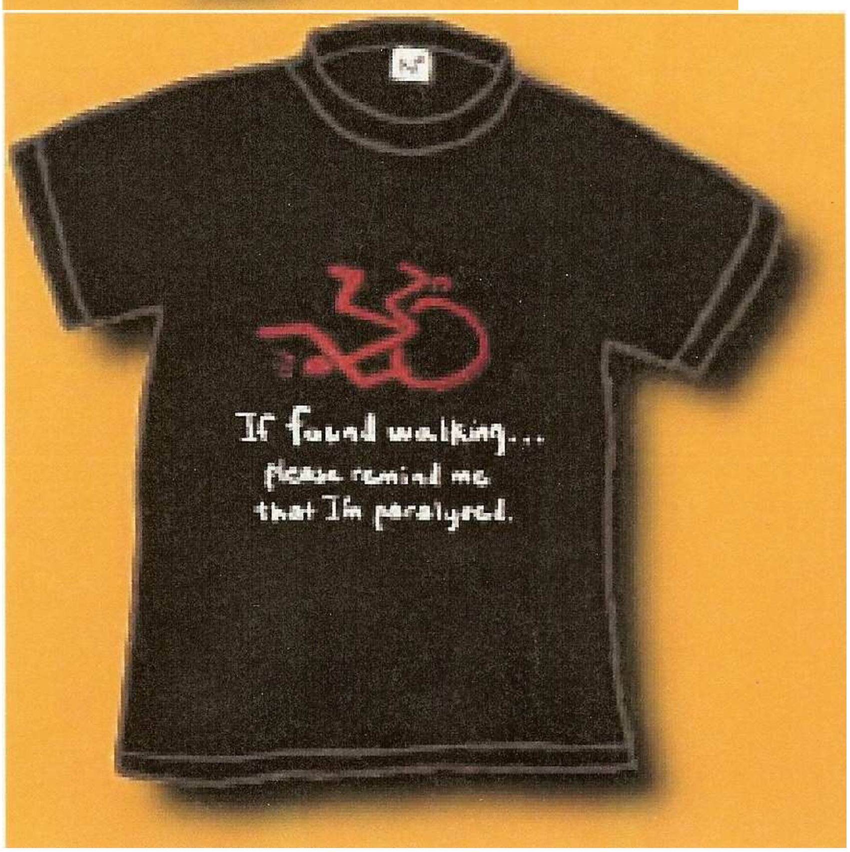

Mouth magazine
#92
A SECOND OPINION


Mouth magazine
#101 & #102
Liberty 101
heart-to-heart
with
Ed Roberts


Journey to Africa
Immune Boost
The Pope of Painting
NM
NEW MOBILITY
LIFE ON WHEELS
MARCH 2006
$4
DJ $hortness:
Spinning Hot


It's two-thirty
in the morning,
I'm legally blind,
and you're looking
darn good to me.


If found walking...
please remind me
that I'm paralyzed.


Boing! Boing! Boing!
Boing!
Fidget... Fidget...
Boing! Boing!
I am who I am.

Social Capital Networking Map

Create a beginning Social Networking Map by completing steps 1 – 3. If you did this as "homework" review your map and add more people to your network.
Individuals have all kinds of people and resources in their social networks. Part of becoming an effective leader is realizing who you have in your network and who else you need to create linkages with to create the changes you are targeting.

As a first step in understanding your own social network, we would like you to create a "picture" of the people and organizations that you can rely on as a leader. To create this picture, follow the steps below:

Step 1. *Who is in your support network*: On the left column of the first sheet, list **all of the people and organizations that you can count on to support you** in your work as leader in the disabilities movement.

Don't Forget:

- Family
- Friends and their family members
- Groups you are connected to
- Specific members of the groups that hold some kind of position in the world
- Volunteer connections
- Job connections
- Faith community connections

Step 2: *Who are they*? Identify who each person is in your network in the right column on the same page. Circle if they are a family member, friend, co-worker/neighbor, or another leader. Feel free to circle more than one thing for each person.

Step 3: *What kinds of support do you get?* Think about how each person supports you as a leader. Place each person in the "support corner" they belong to on page 4 by writing their name in the corner they belong to. Each person's name can be written in more than one corner (if they provide you with more than one type of support). . Here are some descriptions of the four support corners:

<u>Emotional Support</u>: Cheers you along when you are facing challenges, helps make you feel better about your efforts, helps you realize what a great leader you are.

<u>Provides Resources</u>: Offers the resources you need to be a leader, like transportation to a meeting, access to a phone, access to a list of people to call, $$$ to support some cause.

<u>Gives Information</u>: Answers questions you might have; gives you information to help you take action or figure out what to do; helps you solve dilemmas you are facing, links you to other information sources.

Takes Action: Is willing to work side by side with you to make change happen; will attend meetings, march, or write letters, if needed.
Step 3: *What does your network picture tell you?* Look as your network picture and ask yourself the following questions:

In Emerging/Seasoned Leader Pairs
1. Complete step #4 together.
2. When finished, offer ideas to each other about who to add to the map. This might be possible introductions of people you know, and / or names of people to contact.

Step 4: *Reflecting on your network*. Now, take a step back and look at your network. What does it tell you? Here are some questions to think about?

5. Do you have enough diversity in your network? For example, are they all family members? Are you connected to any other leaders?
6. Are you getting the kinds of support you need to be an effective leader? For example, do you have people in your network you can depend upon to take action with you?

At various times during your participation in BAD-L we may ask you to make another map. We also encourage you to add to map as you make connections with people who will help in your project goals.

My Support Network

Please list **all of the people and organizations that you can count on to support you** in your work as leader in the disabilities movement.

Who supports me?	**Who are they?**
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader
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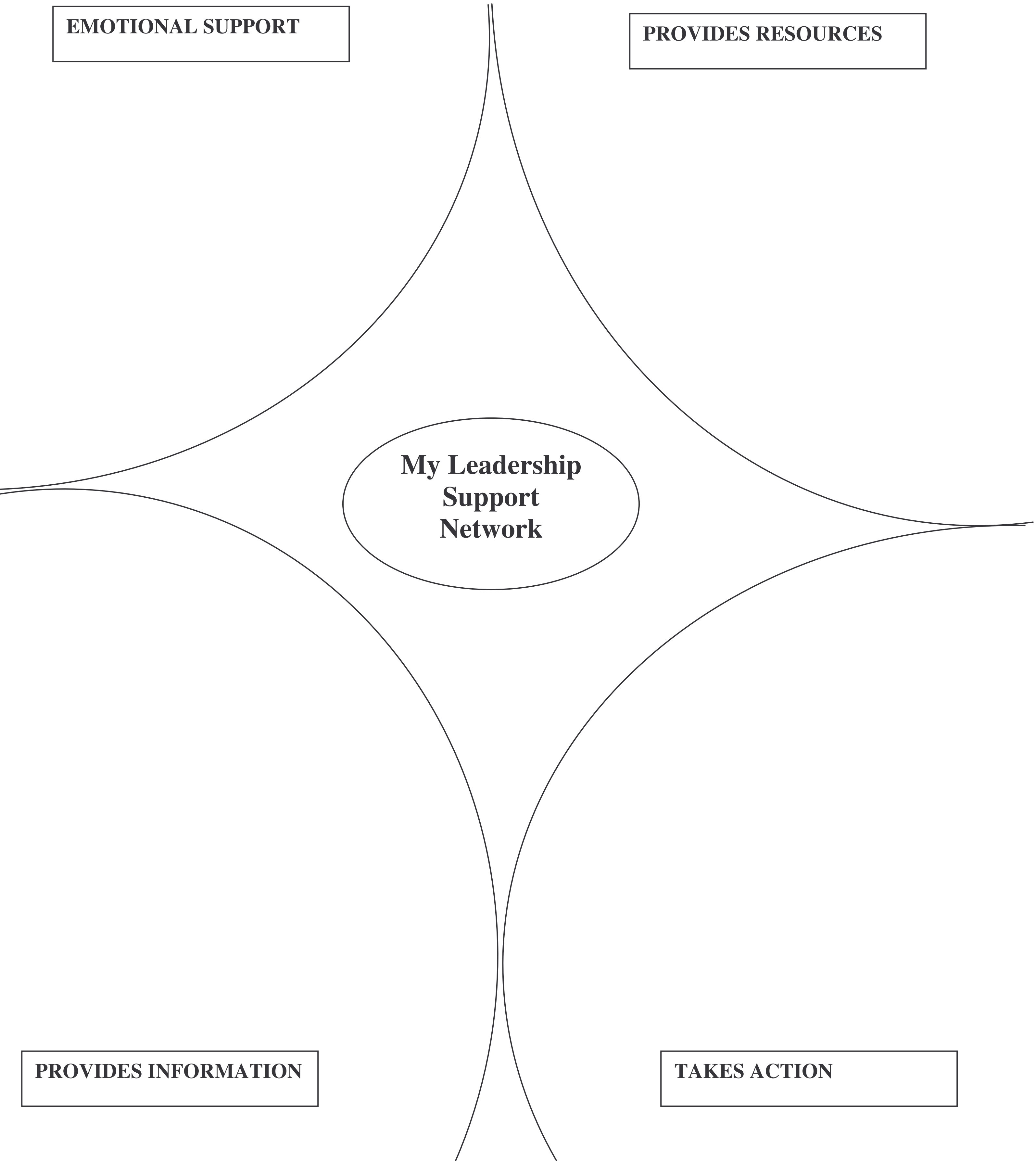
	Family Friend Co-worker Leader
	Family Friend Co-worker Leader


EMOTIONAL SUPPORT
PROVIDES RESOURCES
My Leadership Support Network
PROVIDES INFORMATION
TAKES ACTION

Community Projects

One of the best ways to learn how to become a leader is to work on a project that is designed to make change happen in your community. As part of the BAD-L Leadership Training program, each seasoned /emerging leader pair will work on a small project that they design themselves. These projects should:

- Target an issue or problem that matters to the emerging leader.
- Take about six months to complete.
- Include ideas and strategies that you are learning in the BAD-L training.

During the trainings and the peer-to-peer meetings, we will walk you through a variety of activities that are designed to help select a topic to work on and design your project.

Seasoned /emerging leader teams can apply for a mini-grant to pay for the costs associated with their project such as the materials, training, travel, and meeting costs. Each team can apply for up to $200.00. If you use a mini-grant you will be asked to write a short report at the conclusion of your project. The mini-grant application process will be described in the peer-to-peer meetings in March, 2008. Mini-grant applications will be reviewed and distributed during the March peer-to-peer meetings.

Some tips for designing a successful community project:

- Target something you care about.
- Use the action planning and root cause analysis process that we train you in to figure out why your problem exists and what you can do about it.
- Do something that you can accomplish in a six month period.
- Use this project as an opportunity to make connections with other groups and leaders in your community.

Here are a few dates to keep in mind:

- Draft project plans are due April 18, 2008
- Mini-grant applications are due June 1, 2008
- Mini-grant awards will be made by June 30, 2008
- Projects should be completed by January 30, 2009

MDRC and MSU staff are available to help you design your projects. Please contact us if you have any questions about this process.

THE FIVE WHYS

Rick Ross - From the Fifth Discipline Fieldbook (p108-109)

It's mid-afternoon, an hour before the shift changes at a manufacturing plant, and I'm the foreman. I'm walking through the plant, giving a tour to a friend who happens to be a systems thinker. Suddenly, I see a pool of oil on the floor. So I grab the nearest member of the assembly line crew. "Hey! There's oil on the floor! For Pete's sake, somebody could slip in that! Clean it up!"

When I'm finished, my systems thinking friend breaks in with a quiet question: "Why is there oil on the floor?"

"Yeah," I repeat to the crew member. "How'd the oil get on the floor?"

The crew member replies, "Well, the gabungie's leaking." All of us automatically look up. Sure enough, there's a visible leak up there in the gabungie."

"Oh, okay," I sigh. "Well, clean up the oil and get the gabungie fixed right away."

My friend pulls me aside and murmurs, "But why is the gabungie broken?"

I say, "Yeah, well, the ga-" and turn to the crew member. "Why is the gabungie broken?"

"The gaskets are defective," is the reply.

"Oh well, then, look," I say. "Here. Clean the oil up, fix the gabungie and, uh, do something about the gaskets!"

My friend adds: "And why are the gaskets defective?"

"Yeah," I say. "Just out of curiosity, how come we got defective gaskets in the gabungie?"

The shop floor crew member says, "Well, we were told that purchasing got a great deal on those gaskets."

I can see my friend start to open his mouth, but this time I get there first. 'Why did purchasing get such a great deal?"
"How should I know?" says the crew member, wandering off to find a mop and bucket.

My friend and I go back to my office and make some phone calls. It turns out that we have a two-year-old policy in the company that encourages purchasing at the lowest price. Hence the defective gaskets- of which there is a five-year supply- along with the leaking gabungie and the pool of oil. In addition, this policy is probably causing other problems throughout the organization, not closely related in time or space to the root "cause."

ACTION PLANS

This is one section of a larger leadership manual called "Creating Change Together." For more information or to obtain a copy of the manual, call Connections for Community Leadership at 1-866-532-2669.

When you are advocating, you can increase your chances of getting what you want by making a plan for how you will go about getting it. This is called an action plan. It is simply a problem solving tool – a roadmap to guide you through your advocacy process.

SNAPSHOT

- How to create a plan to get what you want

?

An **ACTION PLAN** is a list of what you want and what you are going to do to get what you want.

Here are some steps to follow so you can create an action plan.

Step 1: Define the Problem
It is helpful to write out a short statement of the problem. This helps you think about what you need to change and can be a helpful reminder if you get stuck or side tracked later in the process. To help you define the problem, ask yourself the following questions:

- How do you know there is a problem?
- How do you feel about the problem?
- Who is affected by the problem?
- When did the problem start? Is it worse at different times?
- What has been done to fix the problem so far? What happened as a result of this? Should this be continued or does something else need to be tried?

Some situations may involve several problems. If so, it is important to list each problem because they may need different advocacy plans. If you have more than one problem, we suggest that you work on the most important problem first.

Step 2: Define the Goal
It is important to be specific when you are saying what you want. A good rule of thumb is to be able to say what your goal is in one sentence. Here are some questions to help you define your goal:

- What do you want?
- What do you want to happen?
- Is your goal something you can get?

?

A **GOAL** is something you want.

If you do not know what your goal is, talk to friends, family members, and other people who know you and your life. They may be able to give you ideas.

It is important to make sure your goal represents the change you really want to make. It is also important to have a goal that is realistic – one that you can accomplish. To help you pick your goal, you want it to meet most of the following criteria:

Result in real improvement in people's lives. If you can see and feel the improvement, then you can be sure that it has actually been won.
Give people a sense of their own power. People should come away from taking action feeling that the victory was won by them, not by the experts.
Be worthwhile. You should feel like you are fighting for something about which you feel good, and which merits the effort.
Be winnable. You should be able to see from the start that there is a good chance for success, or at least there is a good strategy for getting what you want.
Be widely felt. Many people must feel that this is a real problem and must agree with the solution.
Be deeply felt. People must not only agree, but feel strongly enough to do something about it.
Be easy to understand. It is best if you do not have to convince people that the problem exists, that your solution is good, and that they want to help you solve it. Basically, a good issue should not require a lengthy and difficult explanation.
Have a clear target. The target is the person who can give you what you want. When advocating for a difficult issue, you may need several clear targets.
Have a clear time frame that works for you. Advocating for your goal will have a clear beginning, a middle, and an end. You should have an idea of the approximate dates on which those points will fall. You should also allow time considerations for busy times of the year, holidays, and other parts of the calendar year.
Build leadership. You and the other people advocating with you should be building leadership skills, learning new skills, and building ideas.
Set you and/or your organization up for your next action plan. Think about future issue directions and consider the skills you and/or your group will develop advocating and the contacts it will make for the next action plan you undertake.
Raise money. This means having some idea of how you will get funding sources for your action plan if needed.
Be consistent with your values and vision. The goals we choose must reflect our values and our vision for an improved society.

We have created a check list at the end of this section that can help you choose your goal.

Step 3: Identify Allies
Allies are people or organizations that can help you get what you want. They often agree with your goal or what you want. They may be friends and family or they may be people who can support you in making things happen such as policy makers, professionals, and advocates. Here are some questions to help you figure out who your allies are:

- Who agrees with my goal?

- Who will support me?
- Who can I call on when things get hard?
- Who knows a lot of information about my goal?

Step 4: Gather information
After you have identified the problem and thought out your goal, you want to gather all the information you need to be able to get what you want. Here are some questions to help you gather information:

- What do you need to learn about the barriers?
- Who can help you solve the problem?
- Who is in charge of the problem you want to solve?
- What laws are involved with this problem?
- What agencies are involved?
- Who should you talk to at the agencies involved?
- What laws, rules, or policies will support what you want?

It may be helpful to make two lists – one with the information you already have and one with the information you still need to get. When listing information you already have, review notes from any conversations you have had about the problem and/or goal. You can also review materials you got in the gathering information stage. When listing the information you still need to get, think about any information that will help show that the goal you want is needed.

Step 5: Define the barriers
Barriers are problems that are keeping you from getting what you want. They are things that stand in the way of getting your goal. Here are some questions to help you decide what barriers are keeping you from getting what you want:

- What are the barriers?
- What is stopping you from getting what you want?
- Why are the barriers there?
- Who are the people stopping you from getting what you want?
- What policies are stopping you from getting what you want? Can they be changed?
- What programs are stopping you from getting what you want? Can they be changed?

Sometimes the barriers are people. When this is the case, it is helpful to put yourself in their shoes. Think about what their needs are. What arguments do you expect them to make? You may want to write these arguments on your action plan and think about what you will say or do in response to these arguments. Write down your ideas about how you will respond.

Step 6: Define the target
The target is the person who has the power to give you what you are asking for. It is never an institution or elected body. It may seem like it is an organization, but the target is the person within that organization who has the power to make the change. To help you identify the target, ask yourself:

- Who is the person who has the power to give you what you want?
- What power do you have over them?
- What does this person think about what you want?
- Are they resistant to change? If so, why?

In some cases there are secondary targets. A secondary target is the individual who has power over the person who can give you what you want. When identifying the secondary target, ask yourself:

- Who has power over the person with the power to give you want you want?
- What power do you have over them?
- What does this person think about what you want?
- Are they resistant to change? If so, why?

Step 7: Identify possible solutions
Solutions are ways that you can solve a problem. Here are some questions to help you think of solutions:

- What are all the ways you can get past the barriers?
- Which solutions are the best choices for you?
- How can you solve the problems that are keeping you from getting what you want?

It is important to remember that you may not always get exactly what you want. You may have to negotiate (see the section of this manual on negotiation). It is helpful to write down alternative solutions in case you do not get exactly what you want.

NEGOTIATION is when people talk to each other and agree on something.

Step 8: Develop action steps
Action steps are specific things you will do to get what you want and make the solutions happen. This includes a plan for how you will approach the other party and argue your point of view. This may involve telephone calls, writing letters, having meetings, and more. Here are some questions to get you thinking about action steps:

- How can you make the solutions happen?
- Who should you talk to?
- What do you need to do to get what you want?
- Do you know what you need to do?
- Who is the focus of your action steps?

When you are writing down each step, write the date that you want to take each step. These dates are not set in stone, but can help you keep your sense of purpose and direction. Whenever you are requesting something from another person like a meeting, a copy of a policy, or anything that needs a response from the person, tell them a specific date you want to hear back from them by. Two weeks is a good amount of time to give them.

It is also a good idea to note down any other information, material, or support you will need to complete each step.

Finally, think about what you will do if your plan is not successful. There are almost always other steps you can take to help get what you want.

Step 9: ACTION
This is when you actually DO the steps in the action plan.

Step 10: Follow-up
It is important that you keep track of what is happening with your action plan. You want to know what you have done, what you are waiting on, and what still needs to be done. Here are some ways to do this:

- Keep copies of all the letters you send
- Keep a record of all the phone calls you make (see sample telephone record)
- Write down when you talk to someone make notes about the conversation such as the date you made the call, who you spoke with, what you talked about, etc. (see sample discussion notes form)
- If you write a letter to someone, decide when you think you should expect an answer, and put that date in the letter
- If you do not get an answer, think about what to do next, and then do it.

Check List for Choosing a Goal

A good goal is one that matches most of the criteria below. Use this check list to compare goals or develop your own criteria and chart for picking a goal.

Goal 1	Goal 2	Goal 3	Will the issue…
			1. Result in real improvement in people's lives?
			2. Give people a sense of their own power?
			3. Be worthwhile?
			4. Be winnable?
			5. Be widely felt?
			6. Be deeply felt?
			7. Be easy to understand?
			8. Have a clear target?
			9. Have a clear time frame that works for you?
			10. Build leadership?
			11. Set you and/or your group up for your next action plan?
			12. Raise money?
			13. Be consistent with your values and vision?

Developing an Action Plan

You can use this form to apply the eight steps you just learned to a problem in your life that you want to change. This form can become your action plan.

Step 1: Define the Problem

What is the problem?

Who is affected by the problem?

When did the problem start?

What has been done about the problem so far? What happened as a result of this?

Step 2: Define the Goal

My goal is:

Step 3: Identify Allies

Think about all the people who will be involved. Who can help you reach your goal? Who can help you with your solutions? Who are the people in charge of what you want? What agencies can help you? What agencies are in charge of what you want? What are their phone numbers?

People who can help me:

Agencies that can help me:

Step 4: Gather Information

Information I already know:

Information I need to find out:

Step 5: Define the barriers

The barriers to my goal (the things or people keeping me from getting what I want) are:

Step 6: Define the Target

Think about who or what is stopping you from getting what you want. Who has the power to get you what you want?

People who are in charge of what I want:

Agencies in charge of what I want:

Step 7: Identify Possible Solutions

The possible solutions are:

Of these solutions, the best choices are:

Step 8: Develop Action Steps

Think about what actions you have to take for your goal and/or solutions. What do you have to do to make it happen? Who should you talk to? What agencies should you contact? Should you meet with the people in charge of what you want? When do you want each step to happen?

Actions I will take to achieve my goal and/or the best possible solution are:

Developing an Action Plan

Steps to Take	Who is Involved	What Information do I Need	When Should Each Step be Done by	How and When Will I Follow-up

Sample Telephone Record

Here is a form you can use to keep track of the phone calls and people you talk to.

Date	Name of Person Talked To	What We Talked About

Discussion Notes Form

Here is a form you can use to keep track of the people you talk to and what you talked about.

Date: ______________________ Time: ______________________

Kind of discussion (telephone, meeting, other): ______________________________

Discussion with:

Name: ____

Title: ____

Agency: ____

Address: ____

Telephone: ____

Email Address: ____

Reason for Discussion: ____

____

____

Summary: ____

____

____

____

Agreements/Conclusions: ____

____

____

____

Follow Up Needed: ____

____

____

____

BAD-L

Third Training Session

- Social Capital: Part III
- Conflict Resolution
- Proud and Powerful
- Articulating a Vision
- Mini-Grant Opportunities
- Evaluation and Wrap Up

"You've got to think about 'big things' while you're doing small things so the small things go in the right direction."
~ Alvin Toffler

Third Training

WELCOME AND INTRODUCTIONS

(30 minutes)

We want you to notice aware that each time we meet, we are exploring the same large concepts or ideas that we think good leaders know about and practice. Systems Thinking including mental models; critical consciousness, which means awareness of how and why you think about something, as well as awareness of how and why others may think differently; Social Networking; and, Followership as Leadership

Go around the large group and have participants say their name and what the title of this chapter would be if they were writing a book about their leadership development journey.

SOCIAL CAPITAL: PART III

(45 Minutes)

We Are Our Own Network

The goal is to have participants see themselves and the group as a network while also expanding their networks for their projects.

To accomplish almost everything both in our lives and for our communities takes connections. This makes it important to have a wide circle of friends and acquaintances. Friends who are not activists will help our by showing up for events. They also know other people who may be in positions of influence. Each of us have connections through schools, family, or faith communities that we can use to move our projects along. We believe that if we each map out the connections we already have and notice that we are now connected by being in BAD-L we have lots and lots of ways to be influential.

Have participants get into their emerging/seasoned leader pairs and pass out large social network maps to each group. *One way of creating a large social network map is to draw it on large flipchart paper.* Ask each pair to put the topic of their project at the top of the map and then to fill in the map based on their social networks and action plan.

Ask everyone to hang their maps on the wall around the room. In pairs, partners roam the room together and add, with color coded markers, suggestions for expanding the network. *We suggest having each pair have a different color so that when they get their original map back with comments, they know who to go to if they have questions about the comments.* Have each pair get in front of a posted map. They get 3 minutes to provide feedback in their color. After 3 minutes, facilitator rings the bell and all groups move down 1 map to the right. They get 3 minutes to provide feedback in their color. This process repeats until each pair provides feedback on all social network maps.

Next, have everyone return to large group and discuss 2 reflection questions: how do you feel & what does it mean?

Let them know that their homework is to follow up on meeting with the network suggestions.

CONFLICT RESOLUTION

(75 minutes)

The goal of this activity is to have participants consider any conflict between them, learn their own comfort with conflict; and learn ways of dealing with conflict.

"Conflict is working through a difference of opinion. Fighting is the avoidance of conflict." Leonard Hirsch

Conflict is a natural part of living in community with others. Some people thrive on conflict, others avoid it. We have all learned a way of handling conflict that we prefer.

Great leaders understand that conflict is something to manage as we lead others. If we learn how to examine the issue at conflict (use our system's thinking) and manage our response rather than always using the response that we find comfortable, we can use conflict to move our group forward.

There are five types of conflict management that can be understood on two basic dimensions –aggressiveness and cooperation. Post the five kinds of conflict on the chart on a covered flip chart to be used later in this exercise Competing

- **Competing** defined as both assertive and uncooperative; it is a power-oriented mode.
- **Accommodating** is unassertive and cooperative, the opposite of competing.
- **Avoiding** is unassertive and uncooperative; it meets the need of neither self nor other.
- **Collaborating** is both assertive and cooperative; it is the opposite of avoiding.
- **Compromising** is intermediate in both assertiveness and cooperativeness; it strives to find an expedient and mutually acceptable solution.

Conflict Activity

First ask participants to complete the Thomas-Kilman Conflict Mode Instrument individually *(this instrument can be found in their binders).*

Once everyone has had enough time to complete the instrument, review the document "Five Conflict Handling Modes" as a large group *(this document can be found in their binders).*

Then in pairs, discuss your natural mode of handling conflict, where and when it has worked well for you and where and when you would have been happier practicing another mode. Next, have the pairs report back to the large group about their discussions.

Now spend some time in emerging and season leader groups discussing any conflict that might be happening between partners, or within the identified group.

PROUD AND POWERFUL

(60 minutes)

Source: Michigan Disability Rights Coalition

Emotional learning and awareness about what stops them personally (internalized) and what gets in the way of them reaching out to other people with disabilities. Learning how to recognize and resist hierarchy of oppression.

Hierarchy of Oppression Activity

Have participants get into 4 pre-selected groups. Each group gets a handout with the following:

Sam

Sam acquired a spinal cord injury at the age of 27 – right after he received his masters degree in chemistry. He is completely paralyzed from the neck down. He relies on a ventilator to breathe for him and has to have personal assistance care 24 hours a day. He is dependent on people to help him bathe, dress, eat, use the restroom, and to help him complete all other daily living tasks.

Dustin

Dustin was born with cerebral palsy and uses a power chair to get around. People cannot understand his speech and he needs to have someone translate for him. He often drools as he speaks and becomes very loud and spastic when he gets excited or emotional. Dustin's brain functions normally, but he is often treated like a child because of how his disability visualizes itself. Dustin's family and friends did not know how to handle his disability so they put him in a nursing home at the age of 28. Dustin is the chair of the nursing home Resident Advisory Council.

Molly

Molly was born legally blind. She is unable to drive and has to rely on public transportation to get around. Molly went to a school for all blind students and graduated with honors. However, recently began attending a public university and was shocked to be part of general education. Her accommodation needs are not being met and her grades are suffering.

Jack

Jack lives with depression and anxiety. He has been hospitalized 3 times for attempting suicide and also harms himself to relieve his emotional pain. Jack currently is working part-time and has had a hard time keeping a job due to lack of attendance. He goes through periods of deep depression where he cannot get out of bed and socially withdrawals from his loved ones. When Jack is healthy, he volunteers at the local homeless shelter.

Rachel
Rachel has a cognitive disability that leaves her with the mental capacity of a 2 year old. She is now 32 years old and lives with her parents who also have guardianship. She is pretty much nonverbal and has no real understandable method of communication. Her parents cannot afford to get her any assistive technology so there are many times Rachel's needs are unknown and unmet. Rachel enjoys making beautiful pictures with tactile paint.

Each group is to read and discuss the people listed on their handout. They are to rank them from 1-5 (1 being most oppressed to 5 being the leased oppressed). After 10-15 minutes, each group will report their rankings to the large group. *There does not have to be consensus among the group. They can also just talk about how they would individually rank them.*

Next, have participants spend 10 minutes answering one of the following questions in their small groups: *Give each group only 1 question to discuss.*

- How does a hierarchy of oppression play out in the world? In the disability community?
- How does this activity relate to mental models?
- How does a hierarchy of oppression affect social networking?
- How does hierarchy of oppression influence how you act in the world?

Have participants return to the large group and have small groups report back for 15 minutes. Leave group with final questions of: "If we accept the mental model of hierarchy of oppression, can we have a unified movement? How can we identify a hierarchy? How can we resist one?

Internalized Ableism Activity
When we live in a world where we are oppressed – where we are constantly told our lives are unworthy of living, difficult, abnormal, in need of fixing, etc. When we live in a world where systems are in place that keep us held down, poor, unemployed, living in institutions, etc. When we live in a world where hierarchies are in place, pitting us against each other, forcing us to use someone else's oppression as a way to make or own oppression seem "not as bad." When all of these things are in place we as human beings cannot help but internalize these messages.

As a large group, have participants each read a section of the Internalized Oppression article by Micheline Mason out loud until the entire article has been read. Go around the room and have each participant say one word or one sentence describing their initial response to this article.

Explain that their homework will be to have them journal about internalized ableism. Some questions to get them thinking include:

- How has internalized ableism played out in my life?
- What mental models do I have about my own disability?
- How has my own internalized ableism affected my leadership development in the self circle? Community? Visionary?
- How does internalized ableism relate to my own feelings (or lack of feelings) around proud and powerful?

ARTICULATING A VISION

(75 minutes)

Why Visions Are Important

The ability to articulate a vision that will bring you followers seems like a task that for the likes of Martin Luther King, Gandhi, or Nelson Mandela. These men did had a variety of different strengths. What they did have in common was passion.

Articulating a vision begins with building relationships with representatives of the group you are leading. It takes some self-esteem, self-confidence, and self-awareness. It takes the ability to listen to the people. Each of the leaders mentioned above had people around them whose stories they heard, whose experience they understood, and whose lives they were not afraid to share.

Articulating a vision is not a solitary task. It begins with listening to others, testing your understanding of what you hear, and remembering (or writing down) key ideas or phrases that capture ones imagination. A vision is a living expression that can change over time. Often it is refined and tested before it is widely spread.

Vision Activity

Begin by having participants discuss a future for the disability movement – how it should be – in the large group. *The discussion should not be facilitated, this might include long silences.*

Next, have participants break into small groups and identify the themes of the discussion. Then come back as a large group and have the participants share a summary of their small group discussions.

Ask participants to get back into their small groups and write a memorable vision statement that uses what you consider to be the three most important themes.

Come back as a large group and ask the groups to present their vision statements. As a large group, discuss the compelling strengths of each statement.

As a large group, discuss the following questions:

- How did language affect the audience?
- Was the language memorable? Could you repeat it?

- What is important about a vision?
- How was it listening to and incorporating other people's theme/ideas into that vision?

MINI-GRANT OPPORTUNITIES

(15 minutes)

Ask participants how they are doing. Are they paying attention to the mini-grants? This is their chance to ask any questions regarding the information they received at the last peer-to-peer session.

EVALUATION AND WRAP UP

(30 minutes)

Give participants 10 minutes to write in their journals reflecting on the day. Ask participants if they can recall the reflection questions. If not, remind them:

- What just happened?
- How did it make you feel?
- What does it mean?
- What would you do differently?

Have participants divide in small groups and together, fill out 3/5 cards with large concepts written on them. Have participants write on each card what they learned today that supported the large concepts.

Faculty joins the small conversation groups and use this opportunity to ask questions and clarify concepts.

Give participants 5-10 minutes to complete a written evaluation of the this training session. *Be prepared to assist people with reading, writing, etc. if necessary.*

As a group, discuss the following questions:

- What did you like about the past two days?
- What didn't you like?
- What worked well?
- What would you change and how?

Remind them of the next training date, location, time, and anything they need to do between the sessions.

Homework:

- Remember to be working on your proud and powerful expression.
- Follow up on colleagues suggestions to expand your social networks for your projects.

- Reflect on process as a leader and their personal goals (learning, connecting, leading, action) in their journals.
- Submit draft mini-grant applications.
- Journaling regarding internalized ableism:
    - How has internalized ableism played out in my life?
    - What mental models do I have about my own disability?
    - How has my own internalized ableism affected my leadership development in the self circle? Community? Visionary?
    - How does internalized ableism relate to my own feelings (or lack of feelings) around proud and powerful?

Third Training Session Activities and Binder Materials

- **Binder Materials**
    - Conflict Mode Instrument
    - Conflict Handling Modes
    - Conflict Resolution
    - Hierarchy of Oppression Scenarios
    - Internalized Ableism Article

Leadership cannot really be taught. It can only be learned."
~ Harold S. Geneen

THOMAS-KILMANN CONFLICT MODE INSTRUMENT:

Directions: For each question, compare statements A and B and circle the one that best describes you.

1	A	There are times when I let others take responsibility for solving the problem.
	B	Rather than negotiate the things on which we disagree, I try to stress those things upon which we both agree.
2	A	I try to find a compromise solution.
	B	I attempt to deal with all of his/her concerns.
3	A	I am usually firm in pursing my goals.
	B	I might try to soothe the other's feelings and preserve our relationship.
4	A	I might try to find a compromise solution.
	B	I sometimes sacrifice my own wishes for the wishes of the other person.
5	A	I consistently seek the other's help in working out a solution.
	B	I try to do what is necessary to avoid useless tensions.
6	A	I try to avoid creating unpleasantness for myself.
	B	I try to win my position.
7	A	I try to postpone the issue until I have had some time to think it over.
	B	I give up some points in exchange for others.
8	A	I am usually firm in pursuing my goals.
	B	I attempt to get all concerns and issues immediately out in the open.

9	A	I feel that differences are not always worth worrying about.
	B	I make some effort to get my way.
10	A	I am firm in pursuing my goals.
	B	I try to find a compromise solution.
11	A	I attempt to get all concerns and issues immediately out in the open.
	B	I might try to soothe the other's feelings and preserve our relationship.
12	A	I sometimes avoid taking positions which would create controversy.
	B	I will let the other person have some of her/his positions if she/he lets me have some of mine.
13	A	I propose a middle ground.
	B	I press to get my points made.
14	A	I tell the other person my ideas and ask for his/hers.
	B	I try to show the other person the logic and benefits of my position.
15	A	I might try to soother the other's feelings and preserve our relationship.
	B	I try to do what is necessary to avoid tensions.
16	A	I try not to hurt the other's feelings.
	B	I try to convince the other person of the merits of my position.
17	A	I am usually firm in pursing my goals.
	B	I try to do what is necessary to avoid tensions.
18	A	If it makes other people happy, I might let them maintain their views.

	B	I will let other people have some of their positions if they let me have some of mine.
19	A	I attempt to get all concerns and issues immediately out in the open.
	B	I try to postpone the issue until I have had some time to think it over.
20	A	I attempt to immediately work through our differences.
	B	I try to find a fair combination of gains and losses for both of us.
21	A	In approaching negotiations, I try to be considerate of the other person's wishes.
	B	I always lean toward a direct discussion of the problem.
22	A	I try to find a position that is intermediate between her/his and mine.
	B	I assert my wishes.
23	A	I am very often concerned with satisfying all our wishes.
	B	There are times when I let others take responsibility for solving the problem.
24	A	If the other's position seems very important to them, I would try to meet their wishes.
	B	I try to get the other person to settle for a compromise.
25	A	I try to show the other person the logic and benefits of my position.
	B	I approaching negotiations, I try to be considerate of the other person's wishes.
26	A	I propose a middle ground.

	B	I am nearly always concerned with satisfying all our wishes.
27	A	I sometimes avoid taking positions that would create controversy.
	B	If it makes other people happy, I might let them maintain their views.
28	A	I am usually firm in pursuing my goals.
	B	I usually seek the other's help in working out a solution.
29	A	I propose a middle ground.
	B	I feel that differences are not always worth worrying about.
30	A	I try not to hurt the other's feelings.
	B	I always share the problem with the other person so that we can work it out.

Scoring the Thomas-Kilmann Conflict Mode Instrument

Circle the letters below that you circled on each item.

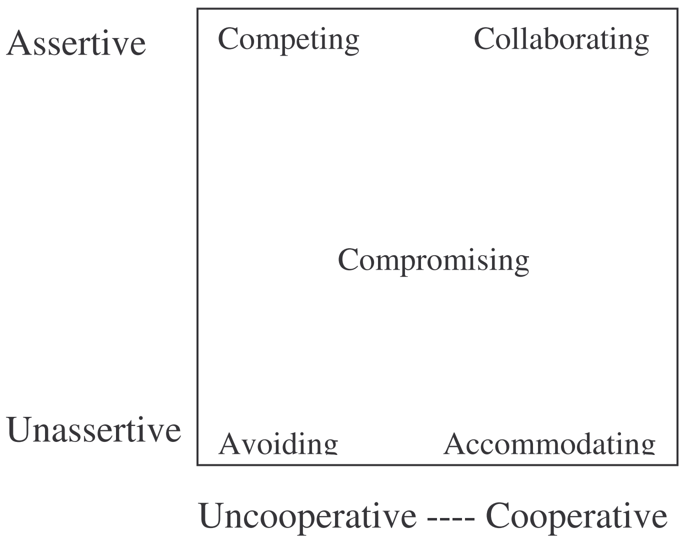
	Competing (forcing)	Collaborating (problem solving	Compromising (sharing)	Avoiding (withdrawal)	Accommodating (smoothing)
1				A	B
2		B	A		
3	A				B
4			A		B
5		A		B	
6	B			A	
7			B	A	
8	A	B			
9	B			A	
10	A		B		
11		A			B
12			B	A	
13	B		A		
14	B	A			
15				B	A
16	B				A
17	A			B	
18			B		A
19		A		B	
20		A	B		
21		B			A
22	B		A		
23		A		B	
24			B		A
25	A				B
26		B	A		
27				A	B
28	A	B			
29			A	B	
30		B			A

Total Number Circled in each column:

____________ Competing	________________ Collaborating	________________ Compromising	______________ Avoiding	________________ Accommodating

THE FIVE CONFLICT HANDLING MODES

The Thomas-Kilman Conflict Mode Instrument is designed to assess an individual's behavior in conflict situations. "Conflict Situations" are situations in which the concerns of two people appear to be incompatible. In such situations, we can describe a person's behavior along two basic dimensions, (1) assertiveness, the extent to which the individual attempts to satisfy their own concerns, and (2) cooperativeness, the extent to which the individual attempts to satisfy the other person's concerns. See the box below:



There are no right answers. All five modes are useful in some situations: each represents a set of social skills. The effectiveness of a given conflict- handling mode depends on the specific situation, and the skill with which the mode is used.

Each of us is capable of using all five conflict – handling modes: none of us can be characterized as having a single, rigid style of dealing with conflict. However, any given individual uses some modes better than others, whether because of temperament or practice. The modes a person uses are therefore a mix of personal predispositions and the situation . A description of each mode, along with questions to ask yourself to determine if you over or under use the mode follows:

Competing ("Might makes Right") is assertive and uncooperative – an individual pursues his own concerns at the other's expense. This is a power-oriented mode, in which one uses whatever power seems appropriate to win one's own position – one's ability to argue, one's rank, economic sanctions. Competing might mean "standing up for your rights," defending a position which you believe is correct, or simply trying to win.

When is competing useful?

1. When quick, decisive action is vital – e.g. emergencies.
2. On important issues where unpopular courses of action need to be implemented.
3. On issues vital to your welfare when you know you're right.
4. To protect yourself against people who take advantage of non-competing behavior.

Some questions to ask to see if you overuse the competing mode:

1. **Are you surrounded by "yes" men/women?**
   (If so, perhaps it's because they have learned it's unwise to disagree with you, or have given up trying to influence you. This closes you off from information.)

2. **Are others afraid to admit ignorance and uncertainties to you?**
   (In competing climates, one must fight for influence and respect – which means acting more certain and confident than one feels. People are less able to ask for information and opinions – they are less able to learn.

Questions to ask to see if you under- use the competing mode.

1. **Do you often feel powerless in situations?**
   (It may be because you are unaware of the power you do have, unskilled in its use, or uncomfortable with the idea of using it. This may hinder your effectiveness by restricting your influence.)
2. **Do you have trouble taking a firm stand, even when you see the need?**
   (Sometimes concerns for others' feelings or anxieties about the use of power cause us to vacillate, which may mean postponing the decision and adding to the suffering and/or resentment of others.)

Accommodating ("Kill your enemies with kindness") is unassertive and cooperative **–** the opposite of competing. When accommodation, an individual neglects their own concerns to satisfy the concerns of the other person; there is an element of self-sacrifice in this mode. Accommodating might take the form of selfless generosity of charity, obeying another person's order when one would prefer not to, or yielding to another's point of view.

When is accommodating useful?

1. When you realize that you are wrong – to allow a better positions to be heard, to learn from others, and to show that you are reasonable.

2. When the issue is much more important to the other person than to yourself – to satisfy the needs of others, and as a goodwill gesture to help maintain a cooperative relationship.

3. To build up social credits for later issues which are important to you.

4. When continued competition would only damage your cause- when you are out matched and losing.

5. When preserving harmony and avoiding disruption are especially important.

A question to ask to see if you overuse the accommodating mode:

Do you feel that your own ideas and concerns are not getting the attention they deserve?
(Deferring too much to the concerns of others can deprive you of influence, respect, and recognition. It also deprives others of your potential contribution.)

Questions to ask to see if you under-use the accommodating mode:

1. **Do you have trouble building goodwill with others?**
   (Accommodation on minor issues which are important to others are gestures of goodwill.)
2. **Do others often seem to regard you as unreasonable?**

3. **Do you have trouble admitting it when you are wrong?**

4. **Do you recognize legitimate exceptions to rules?**

5. **Do you know when to give up?**

Avoiding ("Leave well enough alone.") is unassertive and uncooperative – the individual does not immediately pursue his own concerns or those of the other person. He does not address the conflict. Avoiding might take the form of diplomatically sidestepping an issue, postponing an issue until a better time, or simply withdrawing from a threatening situation.

When is avoiding useful?

1. When an issue is trivial, of only passing importance, or when other more important issues are pressing.

2. When you perceive no chance of satisfying your concerns – e.g., when you have low power or you are frustrated by something which would be very difficult to change (national policies, someone's personality, structure, etc.)

3. When the potential damage of confronting a conflict outweighs the benefits of its resolution.

4. To let people cool down – to reduce tensions to a productive level and to regain perspective and composure.

5. When gathering more information outweighs the advantages of an immediate decision.

6. When others can resolve the conflict more effectively.

7. When the issue seems symptomatic of another more basic issue.

Questions to ask to see if you overuse the avoiding mode:

1. **Does your group's coordination suffer because people have trouble getting our input on issues?**

2. **Does it often appear that people are "walking on eggshells?"** (Sometimes way to much energy can be devoted to caution and the avoiding of issues, indicating that issues need to be faced and resolved.)

3. **Are important decisions being made by default?**

Questions to ask to see if you under-use the avoiding mode.

1. **Do you find yourself hurting people's feelings or stirring up hostilities?**

2. **Do you often feel harried or overwhelmed by a number of issues?** (You may need to devote more time to setting priorities—deciding which issues are relatively unimportant.)

Collaborating ("Two heads are better than one.") is both assertive and cooperative – the opposite of avoiding. Collaborating involves an attempt to work with the other person to find some solution which satisfies the concerns of both persons. It means digging into an issue to identify the underlying concerns of the two individuals/groups and to find an alternative which meets both sets of concerns. Collaborating between two people might take the form of exploring a disagreement to learn from each other's insights, concluding to resolve some condition which would otherwise have them competing for resources, or confronting and trying to find a creative solution.

When is collaborating useful?

1. To find integrative solution when both sets of concerns are too important to be compromised.

2. When your objective is to learn – e.g. testing your own assumptions, understanding the views of others.

3. To merge insights from people with different perspectives on a problem.

4. To gain commitment by incorporating other's concerns into a consensual decision.

5. To work through hard feelings which have been interfering with a relationship.

Questions to ask to see if you over use collaboration:

1. **Do you spend time discussing issues in depth that do not seem to deserve it?**

(Collaboration takes time and energy – perhaps the scarcest resource. Trivial problems don't require optimal solutions, and not all differences need to be worked out. The overuse of collaboration and consensual decision-making sometimes represents a desire to minimize risk by diffusing responsibility for a decision or postponing action.

2. **Does your collaborative behavior fail to elicit collaborative responses from others?**
   (The exploratory and tentative nature of some attempts to collaborate may make it easy for others to ignore the attempts; or the trust and openness may be taken advantage of. You may be missing some cues which would indicate the presences of defensiveness, strong feelings, impatience, competitiveness, or conflicting interests.)

Questions to ask to see if you under- use collaboration:

1. **Is it hard for you to see differences as opportunities for joint gain- as opportunities to learn or solve problems?**
   (Although there are often threatening or unproductive aspects of conflict, indiscriminate pessimism can prevent you from seeing collaborative possibilities and thus deprive you of the mutual gains and satisfactions which accompany successful collaboration.)

2. **Are others uncommitted to your ideas and decisions?**
   (Perhaps their own concerns are not being incorporated into those ideas and decisions.)

Compromising ("Split the difference.") is an intermediate in both assertiveness and cooperativeness. The objective is to find some expedient, mutually acceptable solution which partially satisfies both parties. It falls on a middle ground between competing and accommodating. Compromising gives up more than competing but less than accommodating. Likewise, it addresses an issue more directly than avoiding, but doesn't explore it as much as collaborating. Compromising might mean splitting the difference, exchanging concessions, or seeking a quick middle-ground position.

When is compromising useful?

1. When goals are moderately important, but not worth the effort or potential disruption of more assertive modes.

2. When two opponents with equal power are strongly committed to mutually exclusive goals.

3. To achieve temporary settlements to complex issues.

4. To arrive at expedient solutions under time pressure.

5. As a backup mode when collaboration or competition fails to be successful.

Some questions to ask to see if you overuse the accommodating mode:

1. **Do you concentrate so heavily upon the practicalities and tactics of compromise that you sometimes lose sight of larger issues – principles, values, and long-term objectives.**

2. **Does an emphasis on bargaining and trading create a cynical climate of gamesmanship?**
   (Such a climate might undermine trust and deflect attention away from the *merits* of the issue.)

Questions to ask to see if you under-use compromise:

1. **Do you find yourself too sensitive or embarrassed to be effective in bargaining situations?**

2. **Do you find it hard to make concessions?**
   (Without this safety valve, you may have trouble getting gracefully out of mutually destructive arguments, power struggles, etc.)

CONFLICT RESOLUTION

This is one section of a larger manual called, "Lead On: A Handbook to Starting a Student Organization." For more information or to obtain a copy of the manual, call Connections for Community Leadership at 1-866-532-2669.

Whenever you have a group of people together, conflict is inevitable. It is impossible for 100% of the people to agree 100% of the time. This is true for student organizations as well. Group members may disagree about issues, strategies, events, agenda items, the name of the organization, the constitution and by-laws, meeting times and locations, or even something as simple as the color of a flyer. This information is not meant to scare you off, but rather to prepare you for the realities of a student organization. Conflict will happen whether you like it or not. So, here are a few tools to deal with the conflict when it arises.

There are several ways to handle conflict and it all depends on the situation as to which method you may choose. Some possible ways to resolve conflict include:

- Talking it out
- Taking a vote
- Using mediation services (some colleges/universities provide this service free of charge)
- Calling a meeting with the advisor
- Compromise/Find a middle ground

Asking for Behavior Change[6]

When the conflict revolves around someone's specific behavior, requesting a change in that particular behavior can often resolve the issue. For example: You may need to ask a roommate to turn down the stereo so you can study. It is necessary to request that others change behavior that does not work, but it is often difficult for people to make such requests:

1. You have a right to ask for behavior change from others. (They also have the right to refuse).

2. When you do not ask others to change a problem behavior, you risk allowing the behavior to continue and your relationship to be strained, or waiting until you are "fed up" and starting a fight.

3. Requests for behavior change protect your rights, at the same time they build clear communication and more effective relationships.

4. When asking for behavior change, use an "I message" format:

WHEN ... (objectively describe the other's behavior)

[6] University of Wisconsin Counseling Service

THE EFFECTS ARE ... (describe how the behavior concretely affects you).

I FEEL ... (describe how you feel).

I'D PREFER ... (describe an alternate behavior you prefer).

OK? ... (or synonymous request for closure).

You may wish to follow requests for behavior change with statements of logical consequences ("If you turn down the radio when I need to study, I will also make an effort to be considerate of your needs").

5. Demonstrate assertive body language when asking for behavior change: direct eye contact, erect posture, and clear speech.

HIERARCHY OF OPPRESSION SCENARIOS

Sam
Sam acquired a spinal cord injury at the age of 27 – right after he received his masters degree in chemistry. He is completely paralyzed from the neck down. He relies on a ventilator to breathe for him and has to have personal assistance care 24 hours a day. He is dependent on people to help him bathe, dress, eat, use the restroom, and to help him complete all other daily living tasks.

Dustin
Dustin was born with cerebral palsy and uses a power chair to get around. People cannot understand his speech and he needs to have someone translate for him. He often drools as he speaks and becomes very loud and spastic when he gets excited or emotional. Dustin's brain functions normally, but he is often treated like a child because of how his disability visualizes itself. Dustin's family and friends did not know how to handle his disability so they put him in a nursing home at the age of 28. Dustin is the chair of the nursing home Resident Advisory Council.

Molly
Molly was born legally blind. She is unable to drive and has to rely on public transportation to get around. Molly went to a school for all blind students and graduated with honors. However, recently began attending a public university and was shocked to be part of general education. Her accommodation needs are not being met and her grades are suffering.

Jack
Jack lives with depression and anxiety. He has been hospitalized 3 times for attempting suicide and also harms himself to relieve his emotional pain. Jack currently is working part-time and has had a hard time keeping a job due to lack of attendance. He goes through periods of deep depression where he cannot get out of bed and socially withdrawals from his loved ones. When Jack is healthy, he volunteers at the local homeless shelter.

Rachel
Rachel has a cognitive disability that leaves her with the mental capacity of a 2 year old. She is now 32 years old and lives with her parents who also have guardianship. She is pretty much nonverbal and has no real understandable method of communication. Her parents cannot afford to get her any assistive technology so there are many times Rachel's needs are unknown and unmet. Rachel enjoys making beautiful pictures with tactile paint.

INTERNALIZED OPPRESSION
by Micheline Mason

(first published in Reiser, R. and Mason, M. (eds) (1990) *Disability Equality in Education*, London: ILEA)

"Internalized oppression is not the cause of our mistreatment, it is the result of our mistreatment. It would not exist without the real external oppression that forms the social climate in which we exist. Once oppression has been internalized, little force is needed to keep us submissive. We harbor inside ourselves the pain and the memories, the fears and the confusions, the negative self-images and the low expectations, turning them into weapons with which to re-injure ourselves, every day of our lives"

Some people with disabilities suffer from the condition itself, whilst others don't. All of us, however, suffer from internalized oppression. When the Save the Children Fund did research into the attitudes of black and white children they were shocked to find that by the age of three, black children were already wanting to be white, and that both groups of children valued their white friends more than their black friends. This is the phenomenon of "internalized oppression" - seeing that one group of people are valued more highly than another, and wanting to become like them. This happens every bit as much for disabled children and children with learning difficulties as for black children or working class children.

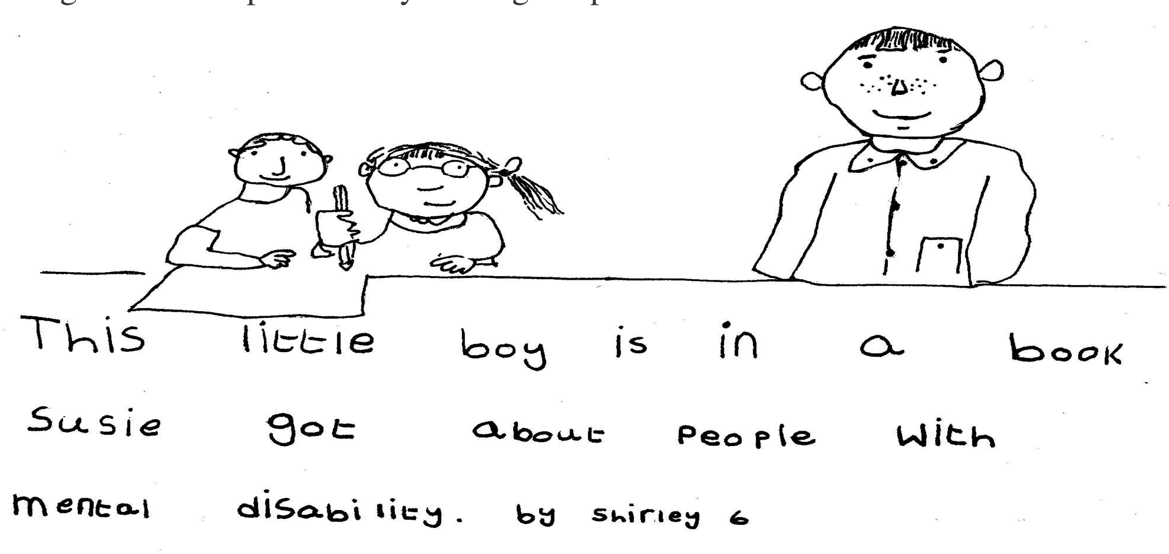
Internationalised Oppression Credit 'Exley – What it's like to be me' p.23

For disabled children the message that there is something wrong with us can start from birth. Imagine yourself to be a baby. You have just struggled out into the world fully expecting a warm welcome, but instead you get "Oh God! How could this happen to me? Aaargh!" How do you think this would make you feel about yourself? Good? No, of course not. The medical model of disability leads from the point of diagnosis to lifetime of feeling that we are a disappointment and a worry to everyone. It seems perfectly logical to conclude that having a disability is a bad thing because it upsets everyone, and eliminating or lessening the disability is a worthwhile obsession because without it, you as a person will be joy to those you love most, instead of misery. Other children play, but you do "therapy". Other children play, but you do "therapy". Other children develop, but you are "trained". Almost every activity of daily living can take on the dimension of trying to make you less like yourself and more like the able-bodied. The world is often quite happy to reinforce this rather than being objective.

The Joy I Lost For Ever
I really wish I were healthy and had my left hand. Nobody knows how much I'd like my life to be better, like those who are strong and healthy. Everybody enjoys living happily, but not m. My life is different. People sometimes do me harm by laughing at me. It is very painful for me and I'd like to avoid moments like this at any cost. When it is warm I'd like to put on a blouse with short sleeves, but I can't. I am simply ashamed. I hate anybody staring at me and seeing the lack of my left arm. I am very sorry then, the older I am the more painful it is to me.
Elzbieta Sobiech

When a person feels bad about themselves, and wishes to be like someone else, it is very common to also feel bad about the group one belongs to, and to try to merge into the group which is perceived as superior in the hope that the difference will be become invisible. This is the other phenomena of internalize oppression, and especially in the world of disability, has led to us dividing and dividing into smaller and smaller groups, competing with and denying each other, leading many of us to become isolated disabled people living with able-bodied people on able-bodied terms - millions of powerless individuals doing our best to "make it" on our own.

This needs contradiction from outside, not the reinforcement it usually gets.
There is a particular danger in attempting to integrate individuals or very small groups of disabled children into a large established, non-disabled community of children and staff, in that there may be no attempt to foster positive and collective identity as young disabled people within an "integrated" setting, as people see this as a reactionary step. In "Good Practices in the Classroom" we make some suggestions as to how this may be attempted, although there is at present very little "good practice" to follow in this area.



Credit Laburnum School

BAD-L

Fourth Training Session

- Model of Change
- Emerging/Seasoned Leader Relationships
- Public Speaking
- Evaluation and Wrap Up

"A strategy is no good if people don't fundamentally believe in it"
~ Robert Haas

Fourth Training

WELCOME AND INTRODUCTIONS
(45 minutes)

Each person has two 3/5 cards, on one write three words that you associate with the word ADVOCATE, on the other write three words that you associate with the word LEADER as a change agent.

Each person speaks the words, then the cards are posted on two separate flip chart pages hanging on the wall.

From Advocate to Leader Discussion
As a large group, discuss, “What does it take to move from one to the next? From Advocate to Leader”

There are many things good advocates and leaders have in common, a vision, passion, commitments to change are few examples. The difference lies in the method.

Advocates do not necessarily engage with others to work together to make a change, but they have a vision they care about, focus on a specific goal and often pursue it alone, or recruit others for specific tasks rather that they become part of the solution.

Leadership starts with a group of individuals. The vision must be a living idea in every person in the group. It is the responsibility of the leader to orchestrate change in concert with individuals, to pay attention to the dynamics within the group, and to develop the group into a strong team that focus on working together toward a common goal. A strong leader is able to help everyone in the group, no matter what their assigned responsibility see their part in moving toward the vision.

MODEL OF CHANGE (EVIDENCE BASED PRACTICE)
(15 minutes)

Over the years, various researchers have studied how society changes. From gathering their data, they develop models that can be followed. When we have a model that has been proven to be true through research it is called “evidence based practice”. More and more, grant makers, whether it is the government or private foundations look for proposals that are based on this idea of “evidence based practice”.

Here is a six step model of change. Notice that some of the steps fit well into the practice of “Root Cause Analysis” that we learned about previously.

1. **Assessment of Community.** What are the needs, issues, context, resources, and history of a community?
2. **Define the problem**. (Use Root Cause Analysis to help identify the various reasons the problem exists.)
3. **Build a coalition.** (Use your relationships, your social network to identify partners and followers)
4. **Develop Strategies.** (We are talking about community level changes. Your strategic plan targets the root causes you identified earlier)
5. **Implement the Plan**. (This calls upon individual actions, sharing responsibilities, being accountable to each other)
6. **Evaluate** (Both how you will know that you have achieved the change you wanted, and an ongoing reflection upon the effectiveness of the plan while it is being implemented. "what happened, how do you feel, what does it mean, and how would you do it differently)

Have participants get into their seasoned/emerging leader pairs and talk about their project and identify which parts of the change model they have paid attention to and what parts they have neglected.

Next, have the pairs report back to the large group.

As a large group, discuss: Can you see from the model of change what parts are advocacy activities and what parts take real leadership to accomplish?

EMERGING/SEASONED LEADER BREAK OUT SESSIONS

(60 minutes)

Have the group divide into seasoned and emerging leader groups. *This activity works best if the groups can be in separate locations.*

Vision Activity – Emerging Leaders Group

As a large group, talk about the importance of a vision.

Visions are important because nobody can follow you until they know where you are headed. Visions are empowering. They are short and memorable.

First we develop our visions. Next, we share our visions. Finally, we lead with our visions.

Ask participants to close their eyes. Tell them to imagine it is 5 years from now. They are at a BAD-L Reunion. They are sharing what they have done. Think about where you are as a leader. Who are you leading? What have you accomplished? Have participants open their eyes and write down words, sentences, draw pictures, etc. about what they were visioning. Be sure to include three things: 1) where you are leading, 2) who your followers are, and 3) what you are accomplishing.

Have participants share what they wrote/drew with the other emerging leaders. After each person shares, have the group give feedback on connections they may want to add to their social networks to achieve their vision.

Part of becoming a leader is figuring out where you want to go. It is digging deep. Everyone's vision will be different and there is no right or wrong vision. Visioning is also about challenging ourselves to become the next thing. Figuring out what your next roles and steps are. Becoming a leader is gaining new experiences and trying new things. You may discover new skills, strengths, likes, etc.

End by having each emerging leader write down two specific things they can do in the next few months to begin moving towards their vision.

Effective Mentoring – Seasoned Leaders Group

During this section we will focus on addressing the challenges of mentoring.

Begin by having seasoned leaders reflect briefly on their first real job, using the following questions:

- What was it that you liked about that job?
- What didn't you like about that job?
- What do you remember about your boss?

Use the response to this reflection as you continue your discussion of addressing mentoring challenges.

BAD-L is more like *Dancing with the Stars* than *Survivor,* it is building a relationship that invites each person to learn from each other to become more than who each person is as an individual.

Focus the discussion on these three key aspects of building a successful alliance for leadership development: shared goals; mutually agreed upon tasks; developing a bond through agreement. Explore both the process of attending to these key aspects and as a product.

When the identified *goal* and listed *tasks* toward accomplishment of the goal is designed by both the seasoned and emerging leader a *bond* will develop based on agreement, support and respect.

Pass out the handout *"Some Things for Seasoned Leaders to Remember."* Ask only for clarifying questions after the seasoned leaders review the handout. Remind them to refer to the handout as they develop the relationship with their partner.

LUNCH CONVERSATION

(30 minutes)

Have all these questions on pieces of paper and participants will draw them out and answer what question they draw.

- What have you done as a leader since we last met?
- How have you changed, as a leader since the beginning of BAD-L?
- Have you seen your leadership compass direction change? How and When?
- What is the hardest act of leadership that you have yet to do?
- Reflecting upon all you have done thus far at BAD-L, what is something that you would have done differently?
- How have you thought differently about what it is to be a leader
- What BAD-L learning moment has be most exciting and why?
- How are you thinking differently about making change?

SPEAKING TO THE PUBLIC

(75 minutes)

People with disabilities are often asked to tell their own story in public. We organize people to testify at hearings, or sometimes to speak at a conference. People's personal stories are examples of a problem policy makers and advocates are trying to solve. Too often people tell their stories without understanding how the stories are going to be used, or how their stories are connected to a policy change that is being discussed.

If you decide to use your story in the service of making a systems change that you understand and choose to work on it becomes a way to feel your own power. WE are going to practice using your story in the service of your chosen issue. At the same time you will get to practice writing and delivering a speech.

You can use this outline when you are speaking to the public, offering testimony to legislators, speaking to an individual policy maker or a small group of people you hope will join your project..

A good speech has an introduction that has a "hook" that will get the audiences attention, it makes two or three specific points, it includes a real life example, and it ends with telling your audience what you want them to do.

The audience for today's practice is a small group of people that you hope will help you with your mini-project. In three hours emerging leaders will compose the speech in with the help of your seasoned leader, practice the speech in a small group with faculty giving feedback, give the speech to the entire BAD-L group, and participate in giving written feedback to your peers.

Pairs compose the speech.

As you prepare a 5 minute speech identify who your audience would be. Keep in mind this choice as you write your speech.

- Introduction. Who are you and why should your audience want to hear you. This is the "hook". The hook motivates your audience, it appeals to one of the following: How does this affect me? We share values. This is an injustice, This hits me in my pocketbook. This is about the law or about equality.. The hook should relate to the 2 or 3 points you want to make in your speech..

- Points. Reflect on your issue and choose the most important points you want to make. Describe your points so that your audience will relate to them. You should be able to refer back to the "hook" you mentioned in the introduction.
- Example. Chose a small part piece of your own story that emphasizes one or more of your points. This should touch the audiences emotions.
- Conclusion. Tell your audience what you want them to do and why they should do it. (The why might be a repeat of something you said earlier). Thank them for listening.

Practice

The speech will be given by the emerging leader of each team. Seasoned leaders will help give feedback.

Divide the group into 3 small groups (a mixture of seasoned and emerging leaders). Have a facilitator/faculty person join each group. Ask each emerging leader to practice their 5 minute speech. The faculty and seasoned leaders will give feedback in the five areas:

- The hook
- The points
- The emotional pull of the example
- The clearness of the audience ask
- The use of the voice in the presentation.

BAD-L SPEECH PRESENTATIONS

(60 minutes)

Have each emerging leader give their five minute speech to the large group. Remind them to preface their speech by telling us who their intended audience is. Ask everyone to give written feedback on the five areas that were used in the practice sessions using the feedback handout. Give everyone 3-5 minutes in-between the speeches to fill out the evaluation forms.

SPEECH EVALUATION REVIEW

(30 minutes)

Pairs review their evaluations and identify two things (one to continue to do and one to improve upon) that are consistent across the evaluations. Have each emerging leader make a statement to the entire group "I heard that I need to keep… and that I need to pay attention to…."

EVALUATION AND WRAP UP

(30 minutes)

Give participants 10 minutes to write in their journals reflecting on the day. Ask participants if they can recall the reflection questions. If not, remind them:

- What just happened?
- How did it make you feel?
- What does it mean?
- What would you do differently?

Give participants 5-10 minutes to complete a written evaluation of this training session. *Be prepared to assist people with reading, writing, etc. if necessary.*

As a group, discuss the following questions:

- What did you like about the past two days?
- What didn't you like?
- What worked well?
- What would you change and how?

Remind them of the next training date, location, time, and anything they need to do between the sessions.

Homework

- Continue working on proud and powerful expressions.
- Follow up on colleagues suggestions to expand your social networks. Emerging leaders should talk with 3 people, as least one with a disability and one with an interest in improving the lives of people with disabilities.
    - What do you think are the most pressing issues for people with disabilities?
    - What do you think we should do about that?
    - I'm going to begin organizing people, would you think about joining that effort?

BAD-L

Fourth Training Session Activities and Binder Materials

- **Binder Materials**
    - Some Things to Remember Handout
    - Speech Review Sheet

"Leadership is action, not position."
~ Donald H. McGannon

Some things for Seasoned Leaders to Remember

It's All About Empowerment…
Empowerment is the process of gaining some control over events, outcomes, and resources of importance to an individual or group.

a) Setting improvement agendas from the perspective of people with disabilities
b) Enhancing support available through enhanced interaction
c) Promoting self-directed behavior change with personal and health concerns
d) Enhancing skills for personal self-advocacy
e) Building the capacities of emerging leaders for systems advocacy

IT is when emerging leaders are empowered in a supportive environment and have developed a spiraling – upward pattern of success that we know we have done good jobs as seasoned leaders.

Seasoned leaders Should…
1. Know that like all human interaction, being a season leader is multifaceted and complex.
2. Communication is KEY to be effective.
    a. Talk through the problem with the emerging leader. Ask questions that will help both of you more fully understand the issues. Be mindful that it is the emerging leader that must discover the correct approach to their individual situation.
3. Seasoned leaders should provide an environment that is structured to provide ample empowerment opportunities for emerging leaders.
4. Emerging leaders need to have frequent interactions with others from similar backgrounds that are in leadership positions. Cast a *WIDE* net!

SPEECH EVALUATION

Name of speaker.

Topic of the Speech:

1. The hook worked on me. It made me interested in the topic. Yes No

It addressed (circle one or more hooks)

It clearly described how the issue might affect me.
It talked about values
It convinced me of injustice
It spoke about money
It described an inequality
It was a legal argument

2. Points

Name the points the speaker made

3. The example pulled me in emotionally? Yes No
The example was simple and clear? Yes No

4. The speaker asked me to…

The ask was reasonable and something I could do? Yes No

5. Use of the Voice

I could hear the speaker?	Yes	No
The way the voice was used was interesting to listen to?	Yes	No
The tone of voice fit the words that were being spoken?	Yes	No

The best thing about this speech was:

I'd suggest you work on:

BAD-L

Fifth Training Session

- Wall of Achievement
- Proud and Powerful
- Burn Out
- Problem Solving
- Proud and Powerful Expressions
- Evaluation and Wrap Up

"Snowflakes are one of nature's most fragile things, but just look at what they can do when they stick together."
~ V.M. Kelly

Fifth Training

WALL OF ACHIEVEMENT
(30 minutes)

Each person gets an 8 ½ x 11 sheet of paper. Have them write down or draw a win/success from their projects.

Then have them explain them to the group and post them on the wall of achievement.

WELCOME AND INTRODUCTIONS
(30 minutes)

Have participants think back to the compass activity. Ask them to individually identify traits from one direction that they feel they need to develop. Have them move to that area of the room and discuss in their groups why they went to that direction.

Next ask them to return to their seats. Pass around Proud and Powerful postcards. Have each person self address the postcard and write themselves a letter for the future on the postcard. This letter should remind them about what skills they want to develop.

PROUD AND POWERFUL
(60 minutes)

Roots Activity
Source: Adapted by Michigan Disability Rights Coalition from Play for Performance.

Purpose: To examine how disability culture and pride can be used to support and sustain our leadership.

Materials: Writing utensils, index cards (or small pieces of paper), large tree drawn on paper, blackboard, or large surface on the wall where everyone can see.

Directions: Give each participant an index card and pen or pencil. Tell them they are to draw a tree that can be realistic or abstract. The only critical requirement is that they only have 45 seconds to draw the tree. Pause while participants complete the task. After 45 seconds, have them stop and ask them to look at their pictures and debrief using the following questions:

- How many of the participants drew roots on their tree?
- So what is holding the trees up without the roots?
- How do these trees get water and nutrition?
- Why did you not draw the roots?

- Was it because you usually don't se the roots?
- How many other things do we habitually ignore because they are not visible?

Once the debriefing is done, shift to the large picture of a tree on the wall. Ask participants what their roots are (i.e. family, spirituality, culture, history, small successes, etc.) and write/draw them as roots on the large tree. Some questions to get them thinking include:

- What holds you up in your leadership?
- When things get rough, what keeps you going?
- What supports your leadership?
- Where do you draw strength from in your leadership?

Finally, as a large group, discuss how it felt doing that activity. What were some of the reactions? How did it make you feel?

BURNOUT

(15 minutes)

As a large group, discuss the following:

- What does burnout feel like?
- How do you know when you are getting burned out?
- How do you deal with burnout?
- What are specific ways that have worked for you in dealing with burnout?
- How can we use our roots to help us deal with burnout?

Refer participants to the "Stress Management and Burnout Prevention" section of their binders for more information and a self-assessment tool.

PROBLEM SOLVING

(120 minutes)

Everyone should receive a copy of the following scenarios:

1. A leader is running a meeting where there are a variety of good ideas and suggestions that will accomplish the goal of the group. Yet, there is no one who will take the responsibility to do the work between meetings. A successful resolution is for members other than the leader to accept a responsibility for the next meeting.
2. A leader is meeting with new friends. The leader wants to recruit the friends to help with a change project for people with disabilities. They like this person but have never been active in a social justice project A successful resolution would be for them to attend an organizational meeting.
3. A leader is meeting with a person who faithfully attends all the social justice meetings and events, but has never volunteered to take on responsibility. The leader wants to bring the faithful follower into a circle of leadership. A successful resolution would be for the person to agree to organize the next event with the leader's coaching.

Have the group break into emerging and season leader groups.

Seasoned Leaders
Split into 3 groups – one group for each scenario.

Ask each group to:
- Read the scenario
- Develop a skit where the leader is not successful in obtaining the desired outcome
- Present the skit to the Emerging Leaders when we return to the large group
- Prepare to do the skit a few times, as emerging leaders practice their intervention ideas with you as actors

Emerging Leaders
Have the emerging leaders review the scenarios and brainstorm (with facilitator) ways to address the problems while working with people individually or in a group. Explain that the seasoned leaders will be joining us shortly and will be doing a skit with these scenarios. The emerging leaders will then join the skit and practice their ideas of addressing the problems.

Next, bring the two groups together. Have the seasoned leaders present their first scenario. When it becomes clear that the leader is not being successful, an emerging leader will step in to try their ideas. Each scenario will be repeated until a successful intervention is made but no longer than 15 minutes.

As a large group, discuss what the groups noticed and what people learned from this activity.

EVALUATION
(20 minutes)

Give participants 10 minutes to write in their journals reflecting on the day. Ask participants if they can recall the reflection questions. If not, remind them:
- What just happened?
- How did it make you feel?
- What does it mean?
- What would you do differently?

Give participants 5-10 minutes to complete a written evaluation of this training session. *Be prepared to assist people with reading, writing, etc. if necessary.*

PROUD AND POWERFUL EXPRESSIONS
(60 minutes)

Have each person share their proud and powerful expression and explain why/how it makes them feel proud and powerful.

Note: If you have someone who is blind or visually impaired in the group, remember to verbally describe each expression.

CLOSURE

(15 minutes)

Go around the room and have each person give a one-sentence message they want to give to everyone here.

BAD-L

Fifth Training Session Activities and Binder Materials

- **Activities**
  - Roots Activity

- **Binder Materials**
  - Burnout Materials

"Leaders aren't born, they are made. And they are made just like anything else, through hard work. And that's the price we'll have to pay to achieve that goal, or any goal."
~ Vince Lombardi

ROOTS ACTIVITY

Source: Adapted from Play for Performance.

Purpose: To examine how disability culture and pride can be used to support and sustain our leadership.

Materials

- ✓ Pens/Pencils
- ✓ Index cards (or small pieces of paper)
- ✓ Large surface with a tree drawn on it

Directions: Give each participant an index card and pen or pencil. Tell them they are to draw a tree that can be realistic or abstract. The only critical requirement is that they only have 45 seconds to draw the tree. Pause while participants complete the task. After 45 seconds, have them stop and ask them to look at their pictures and debrief using the following questions:

- How many of the participants drew roots on their tree?
- So what is holding the trees up without the roots?
- How do these trees get water and nutrition?
- Why did you not draw the roots?
- Was it because you usually don't se the roots?
- How many other things do we habitually ignore because they are not visible?

Once the debriefing is done, shift to the large picture of a tree on the wall. Ask participants what their roots are (i.e. family, spirituality, culture, history, small successes, etc.) and write/draw them as roots on the large tree. Some questions to get them thinking include:

- What holds you up in your leadership?
- When things get rough, what keeps you going?
- What supports your leadership?
- Where do you draw strength from in your leadership?

Finally, as a large group, discuss how it felt doing that activity. What were some of the reactions? How did it make you feel?

STRESS MANAGEMENT & BURNOUT PREVENTION

by Katrina Shields (from the Social Change Training)

High stress levels and burnout are very common among activists - both paid and voluntary workers. High stress levels are, obviously, bad for individuals, for those close to them, and for the organisations in which they work. Turnover can become high, with loss of skilled and experienced people. Stressed people are not effective and can often create conflict and contribute to low morale. They also often act in ways which make it unattractive for new members to join the organisation. Cynicism, negativity and rigid thinking are side effects of chronic stress. Serious anguish and long term physical, emotional and motivational effects that are suffered privately are not unusual amongst activists who have worked for several years.

Taking care of the part of the environment over which we have the most control - that is, ourselves, is a vital part of effective activism. Putting some attention into stress management and physical, emotional and spiritual renewal is, to use Covey's analogy, "taking time to sharpen the saw".

Symptoms of long term stress and burnout

Physical

Chronic tiredness - sleep does not refresh
Decreased immunity - susceptible to colds, flu, allergies
Aches and pains in joints, muscles, stomach or back
Sleep affected - hard to get to sleep or wake early
Weight loss / weight gain
Decreased interest in sex

Behavioural

Withdrawal and isolating oneself from friends and colleagues
Rejecting help
Lack of effectiveness
Paranoid reaction, overly suspicious of others
Not turning up to work / keeping commitments/decreased responsibility / professionalism

Mental / Emotional

Depression
Rigid thinking, lack of problem solving ability
Resentfulness
Negative mind set and irritability
Crying or getting angry easily and inappropriately
Forgetfulness
Anxiety

Spiritual

Cynicism about previously valued things
Devoid of joy and unable to laugh

Sense of futility and loss of meaning
Inner sense of emptiness - nothing left to 'give'
Which of these symptoms if they occurred in your life would you certainly pay attention to and motivate you to change the stressful pattern that caused it?

Burnout Rating Scale

Think over the past 3 months and score the following questions according to how often you have experienced these symptoms.

0 = Never
1 = Very rarely
2 = Rarely
3 = Sometimes
4 = Often
5 = Very often

Adding up your total score will give you some indications whether you are likely to burn out or not.

1. Do you feel fatigued in a way that rest or sleep does not relieve?
2. Do you feel more cynical, pessimistic or disillusioned about things you used to feel positive about?
3. Do you feel a sadness or emptiness inside?
4. Do you have physical symptoms of stress, eg insomnia, stomach pains, headaches, migraines?
5. Is your memory unreliable?
6. Are you irritable or emotional with a short fuse?
7. Have you been more susceptible to illness lately, eg colds, 'flu, food allergies, hay fever?
8. Do you feel like isolating yourself from colleagues, friends or family?
9. Is it hard to enjoy yourself, have fun, relax and experience joy in your life?
10. Do you feel that you are accomplishing less in your work?

Scoring:

0 - 15 You are doing well.
16 - 25 Some attention needed, you may be a candidate.
26 - 35 You are on the road to burnout. Make changes now.
36 - 50 You need to take action immediately - your health and well-being are threatened.

Contributing Factors To Stress

There are many potential contributing factors to stress. They can be grouped in four ways: the nature of our work; personal or individual factors; organisational factors - the nature of our organisation (which the whole group and particularly the management is responsible for) ; and larger socio-political factors over which we have little control

Nature of our work

- Much environmental work involves some or all of the following:

- Prolonged attention on disturbing and negative information and future projections
- Crisis work with a short term focus
- Apparent lack of results - sometimes unrealistic expectations due to lack of understanding of the long-term nature of social movements
- Working against resistance
- Lack of resources

Personal factors

These interact with stressors related to personal relationships, identity, state of health:

- Motives / sense of identity (who we are) / personal values are equated with what we get done (or are seen to be doing)
- Accumulation, of emotions that are not dealt with for instance: grief, disappointment, conflict, uncertainty, frustration and obsession
- Denial of basic needs, for example the needs for adequate nutrition, exercise, sleep, time-out, recreation, creativity, intimacy, spirituality, or privacy
- Lack of personal planning / time management skills
- Inability to set boundaries and limits - staying focussed and effective (see page on effective stress managers / passive victims of stress

Organisational factors

- A group culture or ethos (often set by role models) of working too hard, competitiveness, overly-task focused, with a low process orientation Lack of clear and achievable goal setting, prioritising or realistic expectations
- Lack of review, evaluation, feedback or celebration
- Low team morale or support for individuals
- Unresolved conflicts or unawareness of oppressive attitudes or practices
- Chaotic, noisy, cramped or unaesthetic work environments
- Insufficient induction to jobs/roles and/or lack of training

Sociopolitical factors

- Patriarchal values such as: an attitude that workers are expendable, focussing on feelings or relationships is a waste of time, productivity is everything etc.
- Lack of resources for environmental work
- Early stages of a campaign or setbacks, etc
- Larger political climate

Qualities of Effective and Ineffective Stress Managers

ACTIVE STRESS MANAGER	PASSIVE VICTIM OF STRESS	YOUR

		SELF ASSESSMENT
Puts Energy into areas that can be managed	Leaves many things to fate or chance	
Anticipates and plans for the future	Does not think ahead and does not set clear priorities	
Has a reservoir of time, energy for the unexpected, unplanned and crisis events	Faces deadlines by cramming at the last minute	
Accurate perception of both threats and support from the environment	Sees environment as threatening	
Takes time to evaluate alternative strategies	Lets problems accumulate	
Adopts a strategy to reduce stress directly	Compulsive, stereotyped responses to all threatening, stressful situations. Increases level of stress with his or her reaction	
Takes care of self and body. Avoids overloading capacity by pacing and relaxing	Lack of pacing, self care or diversion	
Seeks help and support as much as possible	Works alone and does not call on help or outside resources	
Manages time by focusing on priorities	Takes on tasks that cannot be completed or are overwhelming	

Personal Strategies for Managing Stress

- Alter / Remove Stressors
- Learn to recognise / anticipate your potential stressor
- Remove yourself from stress inducing situations if feasible
- Take action to manage your environment
- Take organisational / political / social action
- Build up conflict resolution / communication skills
- Life planning, eg set priorities
- Manage your time

Reduce Individual Vulnerability & Build Resistance

- Develop self exploration / self awareness to rework attitudes, beliefs and self talk

- Talk, investigate check out perceptions
- Increase self confidence and assertiveness skills
- Improve social supports
- Balance work and leisure
- Get enough sleep
- Improve health status through nutrition and exercise
- Decrease use of alcohol, drugs, caffeine and nicotine

Reduce Impact of Stress Reactions

- Recognise symptoms - link to causes
- Modify negative self talk and self criticism
- Learn and use calming techniques and stress releasers eg:
    - Relaxation training
    - Meditation
    - Massage
    - Exercise
    - Give priority to self renewal activities
    - Be willing to seek professional help and other support
    - Increase the amount of fun!

Preventing Stress & Burnout as part of Organisational Culture

Some Recommendations

1. Create a group culture / ethos that supports self-care, balance and sustainable work loads and patterns.
2. Take a long-term perspective of planning and working for the long haul, to keep experienced / skilled group members for as long as possible
3. Balance task focus with process and relationship / maintenance focus - in meetings, in daily work, in planning, and in evaluation
4. Provide workshops / training in stress management and burnout prevention - can be as part of conferences, gatherings or ongoing training / orientation.
5. Use regular planning and evaluation as a tool to reduce stress
6. Build stress level checks into reviews and evaluations - how stressed do people feel? What is contributing? What do we need to do about these?
7. Put stress prevention strategies on the agenda for meetings.
8. Allow people to express feelings of distress, grief and loss and frustration - regard them as normal and healthy responses to unhealthy situations and state of the world.
9. Provide individual or group debriefing after critical incidents or high stress campaigns. Keep an eye open for vulnerable individuals and see intervention as valid.
10. Create support structures, eg supervision, mentoring, support / affinity groups, larger group workshops.

11. Put value on socialising, fun, humour, relaxation time as a group.

SUSTAINABLE ACTIVISM Goals and Resources Worksheet

1. Goals and Priorities In order to be effective in my work, sustain myself and enjoy a balanced life what I will change is:
2. Action Plans Exactly what I have to do or find out (who, where, when etc.) to put these into action is:
3. Support The people I need support or cooperation from, or to communicate with to assist my action plans are:
4. The ways I might sabotage my changes are:
5. What I will do about my goals in the next 48 hours is:
6. What I will do in the next 2 weeks is:
7. What I will do in the next 3 months is:
8. I will reward myself for achieving my goals by:

Suggested Readings On Stress Management And Burnout Prevention

Shields, Katrina (1991) In the Tiger's Mouth: An Empowerment Guide For Social Action, Millenium Books, Newtown, NSW

Oriented to social change activists, and contains worksheets and exercises that can be done individually or used to create workshops for groups. Deals with personal and organisational aspects of burnout prevention and recovering from burnout. Also other aspects of working well together.

Green, T & Woodrow, P (1993) Insight & Action - How to Discover & Support a Life of Integrity and Commitment to Change, New Society Publishers, Philadelphia

Good ideas for creating support groups; how to create a "Clearness Process" for personal decision-making. And other useful tools.

Covey, S (1989) The 7 Habits of Highly Effective People, The Business Library, Information Australia, Melbourne

Covey, S & Merrill, A (1994) First Things First Simon & Schuster NY

Both the above provide good strategies for prioritising and working more effectively in all aspects of your life.

Ryan, R & Travis, J (1981) Wellness Workbook - Creating Vibrant Health, Alternatives to Illness and Burnout, Ten Speed Press, Berkeley Ca.

Encouraging self-responsibility for long-term wellbeing.

Jaffe, D & Scott, C (1984) From Burnout to Balance - a Workbook for Peak Performance and Self-Renewal, McGraw Hill, New York

A lot of good self-assessment tools and strategies, oriented to the business world.

PROBLEM SOLVING SCENARIOS

1. A leader is running a meeting where there are a variety of good ideas and suggestions that will accomplish the goal of the group. Yet, there is no one who will take the responsibility to do the work between meetings. A successful resolution is for members other than the leader to accept a responsibility for the next meeting.

2. A leader is meeting with new friends. The leader wants to recruit the friends to help with a change project for people with disabilities. They like this person but have never been active in a social justice project A successful resolution would be for them to attend an organizational meeting.

3. A leader is meeting with a person who faithfully attends all the social justice meetings and events, but has never volunteered to take on responsibility. The leader wants to bring the faithful follower into a circle of leadership. A successful resolution would be for the person to agree to organize the next event with the leader's coaching.

BAD-L

Peer-to-Peer Sessions

"A leader's role is to raise people's aspirations for what they can become and to release their energies so they will try to get there."
~ David R. Gergen

INTRODUCTION

The Peer-to-Peer meetings were originally conceptualized as an informal time for the participants to build their network with each other, to support their learning, and to find answers to questions relating to their projects. The meetings became that and also time facilitators used to emphasize topics that were not fully understood during the day-long training sessions. This section of the curriculum reflects the variety of ways the Peer-to-Peer sessions were used.

There were seven Peer-to-Peer sessions scheduled between the training days. They continued after the training sessions were completed and used as a way to stay in touch with each other.

BAD-L

First Peer-to-Peer Session

"What you always do before you make a decision is consult. The best public policy is made when you are listening to people who are going to be impacted. Then, once policy is determined, you call on them to help you sell it."

~ Elizabeth Dole

9:30 – 9:45 **Brief Welcome and opening ice-breaker exercise.**

Have a simple object at the table - like a ball, a paper plate, a plastic cup, – and everyone has to take a turn holding it up saying the following: My name is ____ and this is not a (insert real name of the object) but instead a (here they are to use their imagination – think outside the box – and assign a different purpose for the object. For example, if we used the paper plate, I could say. *This is not a paper plate but instead a steering wheel.* Then I would illustrate how to use it in that matter. Each group could have a different item.

After everyone does it, ask them how this exercise illustrated some ideas we have talked about in the training so far. – some examples mental models, thinking outside of the box.

9:45 – 9:50 **Overview of the purpose of this peer-to-peer meeting**

i. Why are we doing peer to peer sessions
    1. Heard from leaders we interviewed that learning from their peers was really an importat part of their leadership development.
    2. In organizations today, peer to peer learning is considered a best practice.

ii. There will be six peer to peer sessions over the next year. Designed to give you an opportunity to learn from each other, practice skills you learning in the sessions.

iii. Today's session is designed to help you do two things:
    1. Take first stab at designing your mini-grant project
    2. Have an opportunity to practice your presentation skills. We will be holding a mock City Council meeting – where you will get to present your mini-grant ideas.

9:50 – 9:55 **Overview of mini-grant**

i. Purpose –
    1. Purpose of mini-grant project is to give you an opportunity to practice your leadership and change agent skills
    2. Each team – emerging and seasoned leader – will be asked to develop a small project that they can:
        a. Do to make progress towards addressing the problem they have targeted
        b. Accomplish within six to nine months.
    3. Because many funders are now offering small grants – called mini-grants – to change agents like yourself to initiate a change effort we thought we would give you an opportunity to write such a mini-grant application. You are not required to apply for a mini-grant. But you do need to do a project as part of leadership training program.

4. Today we are going to work on filling out the first part of the mini-grant application for your project. Even if you don't need to apply for some money, the application is designed to walk you through the process of designing an effective community change project.

9:55 – 10:15 **Designing a Mini-Grant Project**

To get you started we are going to walk you through the process of thinking about how to design a small change project that you could include in your mini-grant application.

PASS OUT MINI-GRANT FORMS

PLEASE NOTE THAT AS YOU PROCESS EACH STEP YOU SHOULD USE TIFFENY'S EXAMPLE TO ILLUSTRATE EACH STEP. HOWEVER, DON'T PASS OUT TIFFENY'S EXAMPLE TILL THE END FOR THEM TO HAVE A COPY OF IT.

b. As we said earlier, we have designed the minigrant app to help you walk through the steps in designing a project. Today we are going to focus on filling out questions 1-6. You will see that these questions build upon what you learned at the last leadership training – on action planning and root cause analysis.
    i. Step 1: **What problem are you targeting?**
    ii. Step 2: **Why does this problem exist?** Please describe the conditions that are currently present that keep your problem alive and unresolved. In other words, why haven't we gotten rid of this problem yet? (FACILITATORS NOTE – AFTER THIS PROCESS, ASK THE PARTICIPANTS WHAT CONCEPTS FROM THE TRAINING THIS STEP IS LINKED TO) – ANSWER – IDENTIFYING ROOT CAUSES)
    iii. Step 3: **Given these conditions, what is one condition that you want to change?** Pick something that:
        1. You could make happen in six to nine months.
        2. Could trigger more changes - eventually helping to eliminate your targeted problem.
        3. You would enjoy doing.

        You could get others to rally around. State want you want to do as a goal for this project:
        "We want to…__________________________"
    iv. Step 4: **Who has the power to make the change in this condition?** List the powerful targets below:
        a. Our powerful targets are:
            i. 1______________________________
            ii. 2______________________________
            iii. 3______________________________
            iv. Etc.

    v. Step 5: **What are some conditions that are in your favor that could potentially help you achieve your goal?** For example, are their any pending policy changes coming up, recent media attention, etc. For each condition that you identify,

vi. Step 6: **Who might be potential allies for your project?** These are other groups that may share your concerns, be affected by the same problem, or are already working on tackling this issue.

i. 1______________________________
ii. 2______________________________
iii. 3______________________________
iv. Etc.

vii. Step 7: **Given your analysis of the problem, what are some actions you can take to achieve your goal**. These should be actions that you can accomplish within the next 6 to 9 months that will help you achieve your goal.

1. Action 1: _________________
2. Action 2: _________________
3. Action 3: __________________

viii. Step 8: When this project is completed, how will you know if you have been successful (what outcomes have you achieved)? Identify at least 2 outcomes.

a. Outcome 1:
b. Outcome 2:
c. Outcome 3:

c. Here is an example of one minigrant application

i. Distribute Tiffeny's example and walk them through each question and her answer. .

2. Designing their project (25 minutes)

a. In teams, have everyone work on the first six questions on the mini-grant application. Walk around the room giving each team help/advise in designing their application.

b. Let everyone know that in 20 minutes they will have an opportunity to present their idea to a City Council Hearing – with the intention of getting the City Council to fund/support their project. They should take the last 5 minutes to prepare for that presentation. New leaders should be the ones making the presentation. In this presentation they should make sure that it is clear:

i. What problem they are targeting and why
ii. What they plan to do about it and why they picked this course of action.
iii. What their project will involve
iv. What their project will accomplish

3. City Council Hearing

a. Have everyone sit in a circle as though in a City Council Hearing. Give everyone their Council member assignments (I still need to create these). Have groups volunteer to go. Make sure emerging leaders do the presentation.

b. After each presentation, open it up for questions. Remind people to look at the criteria for evaluating a presentation on their sheet

i. Criteria for presenting/evaluating (City Council Hearing)

1. Understand problem

            2. Why it is a problem
            3. Is goal achievable in 6-9 months
            4. Is strategy likely to achieve goal
            5. Do they have the right allies
4. Discuss budgeting for success
5. Develop allies list
    a. How will you get their buy in?
6. Discuss next steps in mini-grant project

Mock City Council Hearing
Instructions

You are a member of Lansing's City Council. This month the Council is meeting to hear about some projects that leaders in the disabilities community would like the Council to fund. The purpose of this meeting is for individuals to get feedback from Council members on their project ideas. You are looking for projects that will:

Make some positive change happen in six to nine months.
Trigger more changes - eventually helping to eliminate some of the problems people with disabilities face in this community.
Get several other groups in the community to rally around.

Listen carefully to each presentation. When the leader is finished, provide feedback on the following criteria:

Is it clear why the presenters are targeting the problem they are targeting? How could they make this clearer?
Is their goal achievable in 6-9 months? If not, why not? What is something they could target to achieve in 6-9 months?
Are the actions they developed likely to achieve their goal? What other actions would you recommend?
Do they have the right allies at the table? Who else would you add?

Planning Your Project Presentation

To prepare for your presentation to the City Council, take about 5 minutes and answer each question below. Your mini-grant application can be used to help you answer these questions.

- What problem are you targeting and why?

- What do you plan to do about this problem? Why did you pick this course of action?

- In general, what will your project involve and who will be your allies?

- What will your project accomplish?

BAD-L Mini-Grant Application

IMPORTANT DEADLINES:

- Draft Mini-Grant Applications due **April 25**. Please post them on the ANGEL site by April 25**.**
- Final Mini-Grant Applications due on **June 1.** Please post them on the ANGEL site by June 1.
- Grant Awards announced by **June 30th.**

Applicants Names:

____

____

Project Title:

____

____

PART 1: PROBLEM ANALYSIS. Please fill out an answer for each step below.

Step 1: What problem are you targeting?

Step 2: Why does this problem exist?
Please describe the conditions that are currently present that keep your problem alive and unresolved. In other words, why haven't we gotten rid of this problem yet?

Step 3: Pick one of that conditions that you targeted in Step 2 that you want to target for this mini-grant project. Pick a condition that:

1. You could make some changes on in six to nine months.
2. Could trigger more changes - eventually helping to eliminate your targeted problem.
3. You would enjoy working on.
4. You could get others to rally around.

What condition will you focus on in this project?

____

____

What do you hope to accomplish by focusing on this condition?

OUR GOAL IS TO:

____

____

____

____

Step 4: Who has the power to change this condition and help you achieve you goal? List the powerful targets below. Our powerful targets are:

1____

2____

3____

4. ____

5. ____

Step 5: Who might be potential allies for your project? Please identify other groups or individuals that may share your concerns, be affected by the same problem, or are already working on tackling this issue.

1. ____

2. ____

3. ____

4. ____

5. ____

Step 6: What are some current circumstances that are in your favor that could potentially help you achieve your goal? For example, are there any pending policy changes coming up, recent media attention, etc.

PART 2: ACTION PLANNING

Step 7: Given your analysis of the problem, what are some actions you can take to achieve your goal. These should be actions that you can accomplish within the next 6 to 9 months that will help you achieve your goal. Be sure to include actions that help you involve your allies and target the powerful players.

1. Our Actions	2. Who will do it	3. When it will be done

Step 8: When this project is completed, how will you know if you have been successful (what outcomes have you achieved)? Identify at least 2 outcomes.

Outcome 1: ____

Outcome 2: ____

Outcome 3: ____

PART 3: RESOURCES NEEDED

Step 9: What resources will you need to implement your plan? You can apply to receive up to $250.00 from MDRC to support your project. Use the below worksheet to help you figure out how much money you should request from MDRC.

Resources Needed	**Amount Requested from MDRC**	**Please explain amount requested**
Materials (e.g., printing costs, mailing costs, general office supplies)	**$**	
Travel Costs (e.g., gas, paying for a driver or a bus/train)	**$**	
Equipment Costs (e.g., tape recorder, tapes, books, flip charts)	**$**	
Accommodation Costs (e.g., deaf translator, Braille, personal assistant, vehicle)	**$**	
Meeting Costs (e.g., food, room rental)	**$**	
Other (additional expenses not included in the above)	**$**	
TOTAL REQUESTED	**$**	

EXAMPLE: BAD-L Mini-Grant Application

IMPORTANT DEADLINES:

- Draft Mini-Grant Applications due **April 25**. Please post them on the ANGEL site by April 25**.**
- Final Mini-Grant Applications due on **June 1.** Please post them on the ANGEL site by June 1.
- Grant Awards announced by **June 30th.**

Applicants Names:

- Tiffeny Jimenez

- My Seasoned Leader…

Project Title:

“Working Together for the Freedom to Travel on Holidays in Lansing”

<u>PART 1: PROBLEM ANALYSIS</u>. Please fill out an answer for each step below.

Step 1: What problem are you targeting?

People with disabilities in the Lansing area often use public transportation to get to desired locations (e.g. CATA, Spec-Tran). Holidays are days of the year when people like to enjoy their lives in whatever way they see fit. Since people with disabilities may want to visit friends and family, or do other activities on holidays, just like anyone else, it is important that they have transportation in order to get there. Currently, public transportation does not run on all holidays, which makes it extremely difficult for people with disabilities and others to make it to their desired locations on these particularly valued days of the year. This is why it is important that we advocate that public transportation run on all days of the year, but especially on holidays. Holidays include: Easter, New Years, Memorial Day, Thanksgiving, Christmas, and Labor Day.

Step 2: Why does this problem exist?

Please describe the conditions that are currently present that keep your problem alive and unresolved. In other words, why haven’t we gotten rid of this problem yet?

1. Public transportation is not particularly valued in Michigan because it’s a state that values driving cars and many people drive personal cars.

2. Lansing's transportation agency does not know how many people would like to have transportation on holidays. If we had the support of others on this issue we could put pressure on transportation agencies to change this policy.
3. Transportation workers do not want to work on holidays because they do not have good enough incentives to work on holidays.

Step 3: Pick one of that conditions that you targeted in Step 2 that you want to target for this mini-grant project. Pick a condition that:

5. You could make some changes on in six to nine months.
6. Could trigger more changes - eventually helping to eliminate your targeted problem.
7. You would enjoy working on.
8. You could get others to rally around.

What condition will you focus on in this project?

Lansing's transportation agency does not know how many people in the community would like to have transportation on holidays. If we had the support of others on this issue we could put pressure on transportation agencies.

What do you hope to accomplish by focusing on this condition?

OUR GOAL IS TO:
Pressure Lansing public transportation to provide services on some if not all holidays (Easter, New Years, Memorial Day, Thanksgiving, Christmas, and Labor Day).

Step 4: Who has the power to change this condition and help you achieve you goal? List the powerful targets below. Our powerful targets are:

1. Capital Area Transportation Authority (CATA) Board of Directors – they determine the policy for CATA.

2. Local Advisory Committee (LAC) – they provide input to CATA on issues important to seniors and persons with disabilities.

Step 5: Who might be potential allies for your project? Please identify other groups or individuals that may share your concerns, be affected by the same problem, or are already working on tackling this issue.

6. Lansing RICC – already working to change this issue
7. DDC Transportation Committee – working to make transportation changes
8. MSU and LCC students – live in the area and may desire this change
9. The Power of We – they are committed to making sure all people of a community get what they need and would support us on this issue
10. Lansing, East Lansing, Holt & Okemos Residents – Potentially use CATA services and may desire this change; especially retirees.
11. Cristo Rey Disability Group - live in the are and may desire this change
12. Pat Canon of the Michigan Commission for the Blind – Pat is on the CATA Board and would be supportive of the needs of people with disabilities.

Step 6: What are some current circumstances that are in your favor that could potentially help you achieve your goal? For example, are there any pending policy changes coming up, recent media attention, etc.

- CATA has received national awards for their services in 2007 and they may be interested in maintaining that record for 2008, with this complaint/concern about holiday services we could impede their ability to obtain this award again.

- CATA ride prices are going up to $2.50 per ride in the next month and since we will be paying more for services, we may be able to negotiate having services available on holidays.

- CATA Listening sessions are being held in the next month where we can voice our needs.

- LAC meetings are held each month where we can voice our needs.

PART 2: ACTION PLANNING

Step 7: Given your analysis of the problem, what are some actions you can take to achieve your goal. These should be actions that you can accomplish within the next 6 to 9 months that will help you achieve your goal. Be sure to include actions that help you involve your allies and target the powerful players.

1. Our Actions	2. Who will do it	3. When it will be done
Identify some core groups and people who are willing to work on this issue.	I will do this and find others to assist me in this.	I will begin this process as soon as possible and will continue to identify groups throughout the process.
Create a petition/statement that people in the local Lansing areas can sign to demonstrate their need to travel on holidays	Me and a core group of other people and groups interested in this issue will develop this petition together.	One month into this project.
Get contact information of all the people who have signed the petition/statement to be able to organize them around this issue as meetings and opportunities arise to speak on it.	Me and the core group of others working on this will create the petition document and contact list.	2-3 months into the project.
Organize supporters identified to attend up and coming LAC and CATA meetings.	Me and the core group of others working on this.	Once we begin getting contact info for supporters we will immediately begin organizing them to plan who will attend what meetings.
Talk with transportation workers to identify what incentives would encourage transportation workers to work on holidays and create a recommendations list.	Me and the core group of others working on this will work on talking to transportation workers.	Plan to get this information at the same time we identify supporters. 1-3 months into this project process.
With an understanding of the number of people who would like holiday travel and knowing what incentives would encourage CATA workers to work on holidays, create an argument to discuss at meetings.	Me and the core group of others working on this.	Discuss argument for holiday travel at every LAC and CATA meeting held in the next 6-9 months.

Step 8: When this project is completed, how will you know if you have been successful (what outcomes have you achieved)? Identify at least 2 outcomes.

Outcome 1: We will have a core group of supporters for holiday travel that we can call on at anytime to speak on this community need, and possible other needs.
Outcome 2: We will have a written document that describes the argument for holiday travel that any one of our core supporters could use to advocate for holiday travel.
Outcome 3: Lansing public transportation will function on some if not all holidays (Easter, New Years, Memorial Day, Thanksgiving, Christmas, and Labor Day).

PART 3: RESOURCES NEEDED

Step 9: What resources will you need to implement your plan? You can apply to receive up to $250.00 from MDRC to support your project. Use the below worksheet to help you figure out how much money you should request from MDRC.

Resources Needed	Amount Requested from MDRC	Please explain amount requested
Materials (e.g., printing costs, mailing costs, general office supplies) - Stamps, envelopes & paper for letters and notices to be sent out to supporters throughout the project process	**$67.00**	Stamps are $0.42, we estimate for 40 people to contact for 4 meetings throughout the project process = $67.00 Paper and envelopes we will cover on our own.
Travel Costs (e.g., gas, paying for a driver or a bus/train) - Public transportation costs to get to and from community meetings, LAC meetings, and CATA meetings	**$70.00**	$5.00 round trip to and from meetings. 2 community meetings 6 LAC meetings 6 CATA meetings Total = $70.00
Equipment Costs (e.g., tape recorder, tapes, books, flip charts) - Flip charts to bring to community organizing meetings in order to display the thoughts, ideas, and perspectives of supporters when creating petitions and planning actions	**$ 20.00**	The cost of flip charts.
Accommodation Costs (e.g., deaf translator, Braille, personal assistant, vehicle)	**$0**	

- Unsure if accommodations are needed for others yet.		
Meeting Costs (e.g., food, room rental) - Rental of community organizing space at the Hannah Community Center for 2 meetings throughout the project process	**$100.00**	The cost to rent a small room at the center is $50.00. For 2 meetings this would cost a total of $100.00.
Other (additional expenses not included in the above)	**$0**	
TOTAL REQUESTED	**$257.00**	Materials, travel, equipment, and meeting costs.

BAD-L

Second Peer-to-Peer Session

"Whoever is providing leadership needs to be as fresh and thoughtful and reflective as possible to make the very best fight."
~ Faye Wattleton

9:30 – 9:45 Welcome and Overview for the Day

i. Warm up Exercise
   1. Imagine that you have been selected by Random House Books to write a book about your experience as a leader – so far. What title would you give your book.
   2. Write that title on a 5 X 8 card. Be prepared to introduce your book's title to the group.

9:45 – 10:10 Creating Successful projects

1. Pennie will review four concepts that many of the projects could build more into their mini-grant projects. Pennie will briefly introduce the concepts and let everyone know that we will target two of them today – the other two on May 30.
   a. Identifying systemic conditions (or root causes) of your problem.
   b. Understanding the history surrounding your problem
   c. Forming a vision
   d. Building an alliance.

10:10 – 11:10 Identifying the conditions that are creating the problem you want to target.

i. Pennie will teach participants how to think systemically about their problem. She will walk through one example.
ii. Everyone will then have an opportunity to identify systems conditions for their problem.
iii. IF THERE IS TIME - They will share their analyses with another team and give feedback.

INDIVIDUALS WILL BE TOLD TO TAKE A BREAK DURING THIS TIME.

11:10 – 12:10 Understanding the context of your problem.

Pennie will talk about why it is important to develop an understanding of the history surrounding your problem. She will then have the group brainstorm some questions they might want to ask – and introduce some key questions to ask to understand the history surrounding their problem.

- Each group will then be asked to identify some key questions they need to have answered and to identify who could answer them.
- Mentees will practice interviewing their leader – asking these questions.

DURING THE TEAM TIME – INDIVIDUAL TEAMS WILL BE PULLED OUT TO GET ONE-ON-ONE FEEDBACK ON THEIR MINIGRANT PROJECT.

12:10 – 12:30 WRAP UP/EVAL – QUESTIONS TALKING ABOUT MOVING MINI-GRANT PROJECT FORWARD.

Understanding the History of Your Targeted Problem

Step 1: Be a historian. Find out the history of your problem. Hold conversations with people who are knowledgeable about your issue or have tried to tackle it before. Use the attached table to identify what you should learn from these interviews.

Step 2: Put the Pieces together. Think about what you learned in your conversations. Using this information, answer these questions:

What did you learn about your issue?

____

____

____

____

Are there any strategies or tactics you should avoid?

____

____

____

____

Are there any strategies or tactics that might be more successful?

____

____

____

Who should you include in your efforts?

____

____

____

____

What you need to know	What you ask	Who you ask
When did this start to become a problem?		
Has anyone tried to eliminate or reduce this problem in the past? Who?		
What strategies did they use?		
Did they have any success? In what ways?		
What obstacles did they encounter?		
What lessons did they learn as they tried to make this change?		
Any other reasons why they didn’t fully resolve the problem?		
Do they know of any other communities that have successfully addressed this issue? How did they do it?		

Root Cause Analysis
(60 minutes)

Root Cause Analysis
Refer participants to their binders so they can follow along.

When we identify a problem we should stop and take time to ask deep questions about why the problem exists. Maybe even do a bit of research. By exploring the ways in which we understand the problem we can name the reasons there the problem exists and discover an entire system that is not, at first, visible. Remember our discussion about analyzing a system we had on the first day? Root Cause Analysis uses a systems view to discover why something is a problem.

Here are a series of four questions or steps to find the root causes of a problem in the community:

Step 1: What is the problem or issue in our community?

Step 2: How do we know this is a problem in our community?

Step 3: Why does this problem exist in our community?

Step 4: Why do these community conditions exist here?

(Notice how useful it might be to ask a series of "why's" for steps numbers three and four.)

Root Analysis Activity
Purpose: To help participants examine problems and identify the root cause.

Materials: Flipchart paper, markers, root case analysis worksheet

Directions: Break participants into small groups. Have them identify a known problem in the disability rights community. Next, have them use the root cause analysis worksheet in their binders to answer the four questions. Ask them to try asking why five times in Steps 3 and 4.

Have groups post the root cause analysis on flip charts at their tables. Then ask them to take a gallery walk around the room.

After everyone has made it around the room, come back as a large group and have participants share their observations. Are there similar themes? Can you see how the ladder of inference is working in the analysis? What assumptions do you notice and what questions can you ask to clarify those assumptions?

Doing a Root Cause Analysis

Go through a series of four questions or steps to find the root causes of a problem in the community (see figure on next page):

Step 1: What is the problem or issue in our community?

Step 2: How do we know this is a problem in our community?

Step 3: Why does this problem exist in our community?

Step 4: Why do these community conditions exist here?

Root Cause Analysis

Step 4: Root Causes

Why do these community conditions exist?

Step 3: Local Conditions

Why do these problems exist here?

Step 2: Behaviors

How do we know this is a problem?

Step 1: Consequences

What is our problem or issue?

An Example Root Cause Analysis

Step 4: Root Causes	**Step 3**:Local Conditions	**Step 2**: Behaviors	**Step 1**: Consequences
Why do these community conditions exist?	Why do these problems exist here?	How do we know this is a problem?	What is our problem or issue?
Why do these conditions exist in Battle Creek?	*What's happening in Battle Creek that explains why residents are not involved?*	*What do we see, hear about, or experience that shows us that residents are not involved?*	*What is a problem affecting Battle Creek?*
			Residents are not involved or engaged in community change

Root Cause Analysis Exercise

Step 4: Root Causes	**Step 3**:Local Conditions	**Step 2**: Behaviors	**Step 1**: Consequences
Why do these community conditions exist?	Why do these problems exist here?	How do we know this is a problem?	What is our problem or issue?

BAD-L

Third Peer-to-Peer Session

"A community is like a ship; everyone ought to
be prepared to take the helm."
~ Henrik Ibsen

Peer to peer 3 (July 11, 2008) 9:30-12:30
Warm Up Exercise – Introductions Fear in the Hat Activity

Spend time in pair discussing their projects, identifying questions, and then discussing them as a large group

Forming a Vision

Building an Alliance – asking the group for ideas of who to build a alliances with and what resources they would need. Refining their action plans and their mini-grants.

Session Evaluations

BADL Simulation – simulating the education workgroup. Learning how to participate in a meeting. Broke into small groups. Each group identified a real problem relating to their project. Then provided a simulated role-play that engaged the rest of the participants in figuring out the resolution.

FEAR IN A HAT ACTIVITY

Source: Adapted from the We Lead Curriculum

Purpose: To help participants express their fears and build a sense of community.

Materials

- ✓ Pens/Pencils
- ✓ Small pieces of paper
- ✓ Hat

Directions: Set the appropriate tone by introducing the topic of fear and explaining how it is a normal and natural feeling to have when starting and implementing a project. A good way of starting to deal with these fears is to have them openly acknowledged – lay them on the table, without being subject to ridicule.

Ask everyone to complete this sentence on a piece of paper (anonymously): "For my community project, I am most afraid that…" or "During my community project, the worst thing that could happen is…"

Collect all the pieces of paper, mix them around in a hat, and then invite each person to take a piece of paper out of the hat and read it aloud to the group. One by one, each group member reads out he fear of another member and elaborates and what he/she feels that person is most afraid of regarding their community project. No one is to comment on what the person says, just listen and move on to he next person.

> If the reader does not elaborate much on the fear, then ask them one or two questions. Avoid implying or showing your opinion as to the fear being expressed, unless the person is disrespecting or completely misunderstanding someone's fear. If the person does not elaborate after one or two questions, leave it and move on. When all the fears have been read out and elaborated on, then discuss what people felt and noticed.

BAD-L Fourth Peer-to-Peer Session

"A leader must have the courage to act against an expert's advice."
~James Callaghan

1:30-1:45 Start with Icebreaker (Chandra & Tim)

- Give everyone a chance to create events they want to engage in and have people sign up for them during a free time session at the end. I'd say an hour or so for free mingling at the end.

1:45-2:00 Express our vision for project (Tim)

- Ex- from grant:
    - To fully integrate pwds into our society, most communities need to transform their infrastructure and create what is called a "livable community" (National Council on Disabilities, 2006). Livable communities have: 1) affordable, accessible housing and transportation; 2) physical environments that are inclusive and accessible; 3) work, volunteer, and education opportunities for all residents; 4) access to health and support services; and 5) active citizen participation.
- Start with relating the current work with the overall big picture [we are in the business of developing leaders that will assist in creating more livable communities for pwds and through mentoring, networking and action learning we hope to accomplish this with your group.

2:00-2:15 Work time on vision statement

2:15-2:45 Groups express vision (1 minute cap)

2:45-3:00 – Revisit importance of action learning (Chandra)

- Brief discussion of benefits of action learning
    - Action learning emphasizes learning for action: it involves peer-to-peer learning processes where participants consider real problems, engage in reflective inquiry, and identify and pursue actions around them. Three strategies will be used to foster an action learning orientation.

- Review how mentoring and networking are essential concepts within process
    - mentoring is particularly critical given the complexity of social change and the fact that pwds are often isolated within their community; yet it is absent in most disability leadership development efforts
    - Connections with a broad and diverse group of individuals and organizations enhance a leader's capacity to affect change (Rubin & Rubin, 2001). A strong and extensive network provides expanded resources and perspectives; these increase the likelihood that effective change strategies will be designed and broad constituencies will support these efforts

3:00-3:15- discuss the launching/progress of their projects together (in pairs)

- discussing the questions below (hopefully they will have thought about this individually at this point), then maybe we could discuss with the group each of the questions above (Timelines, designing a feasible project, embedding themselves with other orgs/people, ways to connect with others) so they can get feedback from others on how to resolve any issues they're having with project work - how others have worked through those same issues. In general, I'm thinking we just facilitate conversation by asking the questions.

3:15-3:30- Break

3:30-3:45 Open discussion of embedding themselves with other orgs/people

3:45-4:30 - Break out sessions for mentors/mentees

- separate groups could discuss freely any issues they're having with their mentors/mentees and work out ways to resolve any issues there by getting feedback/recommendations from others about how they've handled it. here we could suggest revisiting the agreements/contracts and encourage a discussion with their partner and provide time for them to do that afterwards.

4:30-4:35 - Invitations for Peer Involvement:

- Use clickers to vote for different events – ask either persons posting idea or alternate to begin working on details

4:35-5:00- Team and collaboration discussion time

5:00 Adjourn

BAD-L

Fifth Peer-to-Peer Session

"There's nothing more demoralizing than a leader who can't clearly articulate why we're doing what we're doing. "
~James Kouzes and Barry Posner

Peer to Peer 5
Central County Coalition Simulation

Central County[7]

Disability Coalition

Preliminary Information

[7] This exercise was originally developed by the Association for the Study and Development of Community. It was adapted by Pennie Foster-Fishman, Michigan State University, 125 D Psychology Building, E. Lansing, MI, 48824, (517) 353-5015

Central County

Disability Coalition Agenda Sheet

Background

The State Department of Community Health has just issued a report stating that Central County has the worst outcomes on record for people with disabilities compared to any other county in the state. More specifically, Central County has: 1) the lowest employment rate for people with disabilities; 2) the small city has a very low high school graduation rate for people with disabilities; 3) the rural community in this County has the highest percentage of people with disabilities living in poverty in the state. The governor recommended that the County Commissioner set up a Disability Coalition in order to develop collaborative efforts to improve these outcomes. You have been nominated by the County Commissioner to be on this coalition because you represent an interest group or organization in Central County that is affected by or can respond to these issues. You have accepted because you want to have an impact on your community. This is the first time this type of coalition has been established in Central County. Everyone is interested in this coalition and whether or not it will actually lead to change. One County Commissioner of Central County has declared, "this is a real coalition and I am willing to hear any of the coalition's recommendations." A project coordinator has been hired by the State to assist the coalition in the development of a comprehensive collaborative effort and the County Commissioner has appointed a Chairperson to the coalition. In addition, the Mayor of the small city in Central County has promised that he will use his discretionary Social Service Block Grant Funds ($100,000) to support whatever programs you decide to pursue.

The Task for the Disability Coalition

The purpose of this coalition is to make program recommendations to the Commissioner of Community Health. The proposed programs should help the county improve its disability indicators. The coalition will prepare a plan that will be presented in 5 weeks at a public meeting held by the County Mental Health Department. At that time your coalition will present:

1. A plan of programs for the next three months
2. A plan for how these programs will get underway

The Meeting Schedule

The next **2 1/2 hours** will **represent the four weeks** prior to the week of the public meeting. There will be four weekly meetings **each** lasting about **25 minutes in real time**. There will be **three 15 minute periods** following the first, second and third meetings **for subgroups to form and meet** (e.g., sub-committees can form, interest groups like advocates, service providers or others can use this time to meet to form their strategy during coalition meetings). In the **5th week** you will present your plan to the community at a town hall meeting.

1. During the 1st meeting the assignment is to choose a chairperson, draft a "mission statement" and create a plan of action for the coalition's next two meetings.
2. The 2nd and 3rd meetings are for carrying out this plan.
3. The goal of the 4th meeting will be to finalize an actual set of activities for the next three months.
4. At the end of the 4th meeting you will be asked to present your set of activities to the entire community at the public meeting. You will have 10 minutes to present.

NOTE: Attached you will find the role your mentor/new leader team has been assigned for this exercise. We encourage mentor/new leader teams to talk prior to the peer-to-peer session so they can "get into their role." This exercise is much more fun – and a greater learning experience – if people really take the time to think through how their character might act, etc. Here are some specific ideas about how to get ready for this Coalition Simulation.

- Think through how you might best get your role's needs met within the coalition. Which outcomes might be important to you? How might you want the money to be spent? Where do you want the work to occur? What might you oppose?
- What are some things each of you have learned in your prior experiences that might help with this role play? For example, how have you made sure your needs are met in previous situations? What works in meeting where you might have lots of other individuals with different concerns and needs?

.

Remember – prior to the peer-to-peer meeting, take a moment to get into your role. Imagine what a person in your role would think. What viewpoints will you hold? **Behave from this point of reference as you participate in the coalition meetings**. Please do not share your scripts with others until after the exercise!

Central County Information Sheet

Central County has a population of approximately 300,000. It consists of two towns (one rural and one suburban) and one small city. The rural community is a primarily working class community (75% white and 25% African American), the suburban community is primarily middle to upper middle class (90% white, 5% African American, 3% Latino and 2% Asian) and the small city is stratified – 85% low income (primarily African American and an increasing Latino population) and 15% upper middle class (primarily white). Historically, the major industry is manufacturing, primarily furniture and steel. Given a reduction in foreign consumption of steel, business is bad and unemployment is very high, especially for teenagers and individuals residing in the inner city and rural areas. The growth of service industries (i.e., computer and finance) has led to a two-tier economy – very rich and very poor.

The Same Old Ideas (SOI) party is the majority political party in the County (i.e., the majority of government officials are member of the SOI party). It has been in control of the County for the last 50 years. The Different Old Ideas (DOI) party is the first serious threat to SOI's control of Central County. The DOI party had been gaining influence in Central County. There will be a countywide election shortly after the town hall meeting where the Community Disability Coalition of Central County presents its proposed plans.

In addition to poor outcomes for people with disabilities, Central County has all the problems of an area reliant on industry: a housing shortage, high unemployment, crime, drugs, and declining tax base. The population in the small city has been declining due to limited job opportunities and people are moving to the better financial opportunities in the suburbs. This out-migration has primarily been in the 25-45 age group and therefore there is an unusually large percentage of poor elderly within the city. Forty percent of the population in the small city is over the age of 60.

Role #4

You are psychologists who work in most of the schools in the small city and provides support to parents of children with disabilities. You have worked in this community for 20 years and seen it go through a lot of change. While you recognize the gravity of poverty for people with disabilities, you are more concerned with how youth with disabilities are treated in the school system in small city. You feel children with disabilities are being left behind and that they have no voice. While you are not a fan of new programming, you would support an increased capacity of current teachers in these schools and an increase in the resources available to these schools. You will do anything in your power to block efforts that could reduce the quality of education for children with disabilities. You are concerned that the tendency in the County is to always try something new. You would prefer pooling resources to create change in existing schools programs and bolster the county's efforts to respond to current educational needs in existing schools.

You are willing to be a part of this coalition, but if all the talk is going to be about new programs your interest is not likely to be sustained. **You also have a very busy schedule and do not feel that you can take on tasks outside of the meeting time**.

BAD-L

Sixth Peer-to-Peer Session

"You must unite your constituents around a common cause and connect with them as human beings. "
~James Kouzes and Barry Posner

Peer to peer 6 (March 13, 2009) 9:30-12:30
Announcements
Spent time in pairs
People shared their experiences to date
Talked about successes
Celebrations – What have we done that we should celebrate (individually/as team)
Keeping BADL until June 2010 – Brainstorming Ideas
Certificates

BAD-L Seventh Peer-to-Peer Session

"Time is neutral and does not change things. With courage and initiative, leaders change things."
~ Jesse Jackson

Final Peer to peer 7 (March 12, 2010) 1-4:30pm
1:00 - 1:30pm - Socializing
1:30 – 3:00pm - Checking in on current events and involvement
3:00 – 3:10pm - Break
3:10 – 3:30pm - Pairing up to discuss personal story
3:30 – 4:45pm - Trainees sharing personal stories of community change projects & questions (video)

Was a reunion

BAD-L

Appendix 1: Sample Forms

- Recruitment Letter/Information
- Emerging Leader Application
- Seasoned Leader Application
- Photo Release Form
- Mini-Grant Application
- Peer-to-Peer Evaluation Form

"We must stand in unity. When one person's voice is silenced, it is up to the rest of us to cry out. Justice is not a flexible tool. It must be applied to all and must be applied equally."
~ Leonard Peltier

Michigan Disability Rights Coalition

With Liberty and Access For All

October 5, 2007

RE: EXCITING LEADERSHIP OPPORTUNITY FOR FLINT AND LANSING

Michigan Disability Rights Coalition (MDRC), in partnership with Michigan State University (MSU) and the State Independent Living Council (SILC) is excited to announce a new leadership development initiative; Building Alliances for Disability Leadership (BAD-L). This project is specifically created to capture the interest, imagination and talent of young adults with disabilities between the ages of 20 and 35 who will be matched with community leaders as mentors.

BAD-L is being implemented in Lansing and Flint. We will accept 5 young leaders and 5 mentors from each site into this program. We ask for your help to distribute the call for applicants to your contacts in the Flint and Lansing areas. We are looking for applications from both interested young adult leaders and prospective mentors. Applicants will be interviewed by phone; we will announce the participants the first week of November.

We have attached to this letter a description of the project, and application forms for both young leaders and mentors. Young adult leaders will receive a $50/month stipend for participation in the project. Mentors will be given a $200 honorarium upon completion of the project.

For additional information contact:

Melinda Haus-Johnson
(517)333-2477 x 316
melinda@prosynergy.org

Carolyn Lejuste
(517) 333-2466 x 321
clejuste@prosynergy.org

Applications are due through the mail Oct 20, 2008, by email or post, information for both can be found at the end of the application form.

We are looking forward to this exciting project.

Melinda Haus-Johnson
Leadership Development Coordinator

Carolyn Lejuste
Leadership Project Manager

Building Alliances for Disability Leadership

Are you a person with a disability between the ages 20 – 35?
Are you interested in improving the lives of other people with disabilities?
Are you a leader in the waiting?
Building Alliances for Disability Leadership (BAD-L) may be for you!

Our vision is a connected group of people with disabilities who, together, lead in the creation of a completely inclusive society.

BAD-L matches young adult young leaders with disabilities to mentors, and supports their relationship with a leadership program that is based on the philosophy and methods of grassroots leadership development as well as corporate, government, and non-profit leadership programs.

Project Details

We support the leadership efforts of people with disabilities with a sense of pride and power!

Young adult leaders with disabilities are paired with existing leaders in their community who act as mentors. Both young leaders and mentors will learn along side each other.

- This is a 14 month program.
- The program includes 5 skill building days and 5 peer to peer learning sessions.
- A final day for celebration and conversation about sustainability.
- Young leaders will identify a project, create a plan, and practice leadership skills as they put their plan into action.
- Mentors learn specific skills regarding supporting a person with a disability.
- Data will be collected throughout the program to record the project's effectiveness.

Important Dates (Subject to Change):

Learning Workshops
<u>9:30 – 4:30</u>
Nov 30 & Dec 1, 2007
Jan.25, 2008
Feb 29, 2008
May 1, 2008

Peer to Peer Learning Community
<u>Evenings, 5:30 – 8:30</u>
March 2008
June 2008
September 2008
March 2009

Sustainability and Celebration Meeting
December 2008

Leadership Development Strategies

Mentoring

Mentoring is a pairing of a person who has a specific skill with a person who wants to develop that skill. Both the mentor and young leader share an identified community concern, and make a commitment to work together during the year-long project.

While young leaders are building their leadership skills, mentors will learn more about this specific generation of new leaders, the current circumstances of people with disabilities, and any unique issues that might arise as they support a person with a disability. They will also participate in a learning community of mentors committed to the development of new leaders.

> Within the disabilities movement, mentoring is important because of the complexity of social change and the fact that people with disabilities are often isolated within their community.

Networking

Connections with a broad and diverse group of people and organizations enhance leadership skills to make change. Activities in this project designed to strengthen networks including linking young leaders to mentors' existing networks; engaging teams in activities that increase their awareness of and connections to places and people with a stake in their issue; and bringing participants together in structured learning circles.

Action Learning

Action learning has become a popular and effective strategy where peers learn from each other. Together they consider real problems; engage in concern. Three strategies will be used to foster an action learning orientation:

Learning workshop series

Both mentors and young leaders will participate 5 day-long workshops. They will include mini-lectures, community discussions, and action-learning activities.

Peer-to-peer learning communities

Between workshop sessions, 5 peer-to-peer learning communities will be held throughout the year. An important part of this process is the promotion of reflective practice: young leaders and mentors experiment with ideas and change strategies, then reflect on their effectiveness.

> When peers share their experiences and learn from each other, individual and community ability and the production of learning are both strengthened.

Mini-grant projects

Leadership can not be taught, but instead can only be learned by practicing deliberately. Young leaders will pursue a small project within their community. Young leaders, will select an issue, develop an action plan and implement a small project in pursuit of their social change goals. All teams can apply for limited funding to support their projects.

This project is funded by the Families and Communities Together Coalition at Michigan State University, Michigan Disability Rights Coalition, and the Michigan Statewide Independent Living Council.

Building Alliances for Disability Leadership

YOUNG LEADER APPLICATION

Applicant Information

Full Name: ______________________________ Date: __________

Last *First* *M.I.*

Address:

____

Street Address *Apartment/Unit #*

____

City *State* *ZIP Code*

Home Phone:	( )	E-mail Address:			
Work Phone:	( )	Cell Phone:	( )	Age:	

Are you a person with a disability?	YES ☐	NO ☐	If yes, what is your disability?	
Do you have a guardian?	YES ☐	NO ☐	Guardian's name and phone number:	

Do you need any accommodations (alternative formats, dietary needs, translation services, ASL interpreter, etc.)?	YES ☐	NO ☐

If yes, explain:	

1. What are your areas of interest? (Could include issues specific to the disability community such as transportation, housing, etc. or it could be broader social justice issues such as LBGT rights, peace, racial justice, etc.)

2. Of the issues you listed, please list the 3 areas you are most interested in.

1. 2. 3.

3. What leadership skills would you like to improve or learn more about?

4. Are there mentors in your community that you would like us to tap into? If so, who are they and how do we contact them?

CONTINUED ON BACK

Personal Statement

On a separate sheet of paper, please answer the following questions: (If needed, you can also leave us your phone number and we will call you to answer these questions on the telephone.)

1. Why do you want to participate in this project?

2. What does the word "leadership" mean to you? What skills do you think a leader has?
3. Describe an example of when you feel you have been a leader in your life? Describe your leadership style. Who were your followers?

4. Tell us about your experience(s) with the disability community.
5. How would you describe an ideal mentor/mentee relationship? What role(s) would you like to see your mentor play?

Signature

Participating in the Building Alliances for Disability Leadership project will require the following:

- *An 18 month commitment*
- *Attending 5 day-long trainings*
- *Attending 5 peer-to-peer learning sessions*
- *Conducting a leadership project in the community*
- *Communicating with a mentor on a regular basis*
- *Participating in the research component of this project*

I understand the commitment asked of me and I am willing to participate in this project to the fullest extent possible.

Signature: ______________________________ Date: ______________

Please return completed applications by October 20, 2007 to:

Michigan Disability Rights Coalition
Attn: Melinda Haus-Johnson
780 W. Lake Lansing Rd., Suite 200
East Lansing, MI 48823

Fax: 517-333-2677
Email: leadership@prosynergy.org

This project is funded by the Families and Communities Together Coalition at Michigan State University, Michigan Disability Rights Coalition, and the Michigan Statewide Independent Living Council.

Building Alliances for Disability Leadership

SEASONED LEADER APPLICATION

Applicant Information

Full Name: ______________________________ Date: __________

Last *First* *M.I.*

Address: ______________________________

Street Address *Apartment/Unit #*

____

City *State* *ZIP Code*

Home Phone:	( )	E-mail Address:			
Work Phone:	( )	Cell Phone:	( )	Age:	

Are you a person with a disability?	YES ☐	NO ☐	If yes, what is your disability?	

Do you need any accommodations (alternative formats, dietary needs, translation services, ASL interpreter, etc.)?	YES ☐	NO ☐

If yes, explain:	
Name of employer:	

1. What issues are your current leadership efforts focused on? (i.e. housing, transportation)

2. What population do your currently work with in your leadership? (i.e. people with disabilities, women, African-American youth)

3. What are your areas of interest? (Could include issues specific to the disability community such as transportation, housing, etc. or it would be broader social justice issues such as LBGT rights, peace, racial justice, etc.)

4. Of the issues you listed, please list the 3 areas you are most interested in.

1. 2. 3.

CONTINUED ON BACK

Personal Statement

On a separate sheet of paper, please answer the following questions: (If needed, you can also leave us your phone number and we will call you to answer these questions on the telephone.)

1. Why do you want to participate in this program?

2. What does the word “leadership” mean to you? What skills do you think a leader has?

3. Tell us about your leadership experience(s). (how long, what focus, what you have done, etc.)

4. Tell us about your experience with the disability community.
5. How would you describe an ideal mentor/mentee relationship? How would you help develop leadership skills in the mentee you are paired with?

Signature

Participating in the Building Alliances for Disability Leadership project will require the following:

- *An 18 month commitment*
- *Arranging own transportation to attend all 5 day long trainings*
- *Arranging own transportation to attend all 5 peer-to-peer learning sessions*
- *Supporting a leadership project in the community*
- *Communicating with a mentee on a regular basis*
- *Participating in the research component of this project*

I understand the commitment asked of me and I am willing to participate in this project to the fullest extent possible.

Signature: ____ Date: ________________

Please return completed applications by October 20, 2007 to:

Michigan Disability Rights Coalition
Attn: Melinda Haus-Johnson
780 W. Lake Lansing Rd., Suite 200
East Lansing, MI 48823

Fax: 517-333-2677
Email: leadership@prosynergy.org

Building Alliances for Disability Leadership * www.copower.org/fact/index.html * 1-866-532-2669
This project is funded by the Families and Communities Together Coalition at Michigan State University, Michigan Disability Rights Coalition, and the Michigan Statewide Independent Living Council.

BAD-L PHOTO RELEASE FORM

PHOTO RELEASE FORM

By signing this form you consent to have your photograph taken and give permission to the photographer to publish these photographs as part of the BAD-L project curriculum, advertisements, publications, or website. These images may be published in any manner. Furthermore, you will hold harmless all individuals and organizations affiliated with the BAD-L Project from any liability by virtue of any blurring, distortion, or alterations.

Please print:

Model's full name:

Address:

City:

State: Zip code:

I affirm that I am more than 18 years of age and competent to sign this contract on my own behalf. I have read this release and fully understand its contents.

Adult Signature/Date:

____

BAD-L Mini-Grant Application

IMPORTANT DEADLINES:

- Draft Mini-Grant Applications due **April 25**. Please post them on the ANGEL site by April 25**.**
- Final Mini-Grant Applications due on **June 1.** Please post them on the ANGEL site by June 1.
- Grant Awards announced by **June 30th.**

Applicants Names:

____

____

Project Title:

____

____

PART 1: PROBLEM ANALYSIS. **Please fill out an answer for each step below.**

Step 1: What problem are you targeting?

Step 2: Why does this problem exist?
Please describe the conditions that are currently present that keep your problem alive and unresolved. In other words, why haven't we gotten rid of this problem yet?

Step 3: Pick one of that conditions that you targeted in Step 2 that you want to target for this mini-grant project. Pick a condition that:

9. You could make some changes on in six to nine months.
10. Could trigger more changes - eventually helping to eliminate your targeted problem.
11. You would enjoy working on.
12. You could get others to rally around.

What condition will you focus on in this project?

____

____

What do you hope to accomplish by focusing on this condition?

OUR GOAL IS TO:

____

____

____

____

Step 4: Who has the power to change this condition and help you achieve you goal? List the powerful targets below. Our powerful targets are:

1____

2____

3____

6. ____

7. ____

Step 5: Who might be potential allies for your project? Please identify other groups or individuals that may share your concerns, be affected by the same problem, or are already working on tackling this issue.

13. ____

14. ____

15. ____

16. ____

17. ____

Step 6: What are some current circumstances that are in your favor that could potentially help you achieve your goal? For example, are there any pending policy changes coming up, recent media attention, etc.

PART 2: ACTION PLANNING

Step 7: Given your analysis of the problem, what are some actions you can take to achieve your goal. These should be actions that you can accomplish within the next 6 to 9 months that will help you achieve your goal. Be sure to include actions that help you involve your allies and target the powerful players.

1. Our Actions	2. Who will do it	3. When it will be done

Step 8: When this project is completed, how will you know if you have been successful (what outcomes have you achieved)? Identify at least 2 outcomes.

Outcome 1: ____

Outcome 2: ____

Outcome 3: ____

PART 3: RESOURCES NEEDED

Step 9: What resources will you need to implement your plan? You can apply to receive up to $250.00 from MDRC to support your project. Use the below worksheet to help you figure out how much money you should request from MDRC.

Resources Needed	Amount Requested from MDRC	Please explain amount requested
Materials (e.g., printing costs, mailing costs, general office supplies)	$	
Travel Costs (e.g., gas, paying for a driver or a bus/train)	$	
Equipment Costs (e.g., tape recorder, tapes, books, flip charts)	$	
Accommodation Costs (e.g., deaf translator, Braille, personal assistant, vehicle)	$	
Meeting Costs (e.g., food, room rental)	$	
Other (additional expenses not included in the above)	$	
TOTAL REQUESTED	$	

Peer-to-Peer Evaluation Form

Insert Date Here

1. What did you like **most** about the peer-to-peer meeting?

2. What did you **least** like about the peer-to-peer meeting?

3. What **recommendations** do you have for future peer-to-peer meetings? How can we make these meetings **valuable to you?**

4. Should the peer-to-peer **group**s stay the same (with the same people in them) or should we move people around each time?

5. **Any thing else** we should know?

BAD-L

Appendix 2: Facilitator Resources

- Pre-Program Planning
- Participant Recruitment
- Lejuste Three Dimensions of Leadership Development
- In Praise of Followership

"Revolutions begin when people who are defined as problems achieve the power to redefine the problem."
~John McKnight

PRE-PROGRAM PLANNING

The findings of the study conducted by Dr. Foster-Fishman's class contributed to identifying components that develop and support effective disability leadership for the goals of the disabilities rights movement in Michigan.

- **Mentoring:** Mentoring is a pairing of a person who has a specific skill with a person who wants to develop that skill. Mentoring is often used as a way to develop leadership. Within the disabilities movement, mentoring is important because of the complexity of social change and the fact that people with disabilities are often isolated within their community. Unfortunately, mentoring is often absent in most disability leadership development efforts.

- **Networking:** Connections with a broad and diverse group of people and organizations enhance leadership skills to make change. A strong and large network offers more resources, ideas, and points of view. Strong connections make the chance that workable change strategies will be designed that have large support and lasting effects. Again, due to the isolation experience by many people with disabilities, and the lack of opportunities for interpersonal skill development throughout the lifespan, learning how to network and how to use ones network can be an important and necessary skill in creating community change.

- **Action-learning:** Action learning has become a popular and effective strategy used to promote leadership within organizations. Action learning involves peer-to-peer learning processes where participants consider real problems, engage in reflective questioning, and identify and pursue actions around them. The use of action learning is based on an assumption that leadership cannot be taught, but instead can only be learned by practicing deliberately. For people with disabilities, practicing the skills necessary for community change are paramount in learning how to best maneuver oneself as a leader with unique strengths and abilities.

These three components were considered in the development of the BAD-L training program but also encompassed the specific needs of the population that the training sought to train. The use of focus groups was helpful in providing such direction along with the mentoring, networking, and action-learning recommendations of successful leaders within the specific context of Michigan.

Use of Focus Groups for BAD-L Project Planning

Prior to the development of the BAD-L program we hosted 2 focus groups with people who might potentially be involved in BAD-L to learn what the needs of participants might be in working to create systemic community change so we could design the most appropriate program for them. Of the 2 focus groups developed, there was one for mentors and one for mentees.

Participants:

One focus group included 8 people in Mid Michigan who have been identified as having acted as mentors of people with disabilities. The second focus group included 8 people with disabilities between the ages of 20-35 that either self-identify as being a leader or have been recommended by others as being a leader in their community.

Recruitment:
To recruit mentors for the first focus group we sent letters to our partner organizations and asked them to make recommendations and provide us with contact information. To recruit leaders for the second focus group we sent letters to student disability groups, local college/university disability centers, and the local Regional Interagency Consumer Committee (RICC) asking them to reply back to us with their recommendations and contact information. Once a list of potential focus group participants for both groups were identified we contacted them to see if they were interested in participating. Participants were provided with lunch in appreciation for their time. Dates when the focus groups were held depended somewhat on the availability of the participants that decided to participate. Both focus groups took approximately 2 hours and were audio taped. All questions that guided the group discussions followed an open-ended protocol.

Protocol:
The focus group protocol included questions that covered nine sections of inquiry: 1) understanding “leadership”, 2) understanding what it takes to become an effective leader, 3) what people need to be trained on to develop leadership capacities, 4) supports that might be needed, 5) what it takes to create systems change, 6) challenges that participants should expect, 7) understanding effective mentoring, 8) How to make the project attractive to potential participants, and 9) outcomes of the project.

Data Analysis:
Due to the exploratory nature of this phase of the study, inductive qualitative analysis was used. First, all group discussions were transcribed, read, cleaned, and organized in qualitative analysis software. Second, data was coded and organized by the research questions. This phase of the analysis process entailed coding transcripts and checking those codes by discussing them with other project coders. Within-case analysis was used to understand the variety of experiences within each focus group around the specified areas of inquiry.

Focus Group Findings:
What we learned from focus groups was used to inform the design of the project and the curriculum. Each group was asked about leadership, how to develop leadership skills, challenges to leadership, creating systems change, and mentoring.

Below you will find some of the themes identified by the *<u>Mentee</u>* focus group participants.

Understanding "leadership":
- One can be a leader in various settings
- One can be a leader and not acknowledge it
- Different forms of leadership (leading as a listener, leading based on strengths, leading as part of a team)

Understanding "effective leader":
- Need a variety of skills and attributes

- Must have passion, positive sense of identity, confidence, and ability to take risks
- Have an understanding of issues outside of self
- Becoming an effective leader takes time
- Need to know how to address an issue
- Need to know what people to contact and involve

What training is needed to develop leadership

- How to advocate
- How to work with various people
- Systems change

Supports needed to develop leadership:

- Supportive environment
- Positive social support
- Necessary accommodations to fully participate

Challenges leaders should expect:

- Social stigmas
- Geographic issues
- Social and physical disconnections from efforts
- Hierarchy within the disability community
- Limited availability
- Time management issues and needs
- Limited public awareness of the issues

What it takes to create systems change

- Training on systems change is complex
- Educate on existing change efforts
- Need collaboration with allies
- Need to be focused
- Need to be backed by funding
- Need ongoing advocacy efforts
- Need results and numbers to support efforts
- Need a long-term vision

Understanding "effective mentoring"

- Mentors are needed more when just starting out
- Peer mentoring can be very helpful
- Qualities of a good mentor include being supportive, linking you to resources and opportunities, having patience, and knowing how to work with others
- Need mentors with and without disabilities

Below you will find some of the themes identified by the *Mentor* focus group participants.

Understanding "leadership"

- Leadership comes in different forms and styles
- Leadership specifically for the disability movement
- Building a sense of community is key
- Leadership for people with disabilities begins with self-advocacy

Understanding "effective leader"

- Knows how to act in certain situations
- Leads others down a path of discovery
- Motivates and makes room for others to act
- Willing to do the work that's needed
- Ability to connect with an audience
- Effective leader in disability community must maintain a positive identity with the disability community and have passion for the work

What training is needed to develop leadership

- Train people with disabilities like anyone else
- Allow for self-discovery
- Individualize trainings
- Take an action learning approach
- Link leaders to the disability community
- Train particular content of the disability movement (oppression, disability experience, history)
- Train on the important of coalition building
- Train that systems change is incremental

Supports needed to develop leadership

- Social support
- Emphasize hope and opportunity

Challenges leaders should expect

- Increased inequality due to having a disability
- Feeling burnout
- Beware of taking on too much
- Understand despair and oppression

What it takes to create systems change

- Systems change is incremental
- Change is slow so celebrate small wins
- Coalitions are key to systems change
- Systems change takes many approaches

Understanding "effective mentoring"

- Need to know what the mentoring is really about
- One-on-one mentoring is important
- Set an example of what is possible

- Mentors can do many things for mentees (encourage involvement in new challenges, help them understand the importance of focus and balance, support them and work to build their confidence, instill a passion for the movement, help them become more self-aware, help them develop a resource network)
- Two approaches to mentoring (bring them along with you, share stories, and make a little plan of action to do it together; and lead from behind the scenes
- Assigning mentors to mentees does not work
- Practice network idea

BAD-L PARTICIPANT RECRUITMENT

Participant recruitment involved an intentional search for a total of 20 highly motivated mentors and mentees; 10 mentors and 10 mentees. In order to obtain a more diverse sample, the recruitment sites were Lansing and Flint Michigan.

Criteria of Participants Sought

Mentees: The criteria for identifying potential mentees involved identifying a diverse group of people with disabilities with some type of leadership experience that were also highly motivated to make changes in their communities for the purposes and needs of the larger disabilities community, such as: modifications to transportation, housing policy, or health care needs. We agreed that participants should represent: gender equity, cultural diversity (race and ethnicity), non-traditional leaders (e.g. non-college students, trade school students), and should not maintain the disability hierarchy. We sought mentees between the ages of 20 - 35. Young adults between 20 - 35 represent the time most people with disabilities lose connection to existing leadership programs because they either age out of the school system (age 26) or graduate from college. As a result, this cohort is under represented in most leadership efforts. It was decided that it was critical that we engage them, because they not only represent the next generation of potential leaders, but also are at a prime developmental stage for developing their identity and skills as a leader.

Mentors: Recruitment efforts sought to recruit mentors that would: know how to make change happen, have experience mentoring people between ages 20-35, be experienced in any area/topic as a leader or change agent, and have some experience working on systems change within any topic area of interest. Mentors did not need to be persons with disabilities. Although it was considered ideal that mentees and mentors would have similar community change interests, this was not part of the recruitment criteria.

Recruitment Procedures

To recruit mentees we first created applications and flyers (see Appendix 1) taking into consideration the recommendations from the focus groups. Every effort was made to recruit a diverse set of participants. Advertising for the program involved casting a wide net out to the cross-disability community. Flyers and applications for involvement were advertised and sent via various avenues, such as: listservs, snail mail, email, the project website, and in person. It was hoped that the materials would reach people with disabilities and disability organizations of all kinds (e.g. Community Mental Health counselors, the Developmental Disabilities Council, Division on Deaf and Hard of Hearing, Commission for the Blind, The Arc, Centers for independent Living, Rehabilitation Services, Regional Interagency Consumer Committees (RICC), Fairweather Lodges, Transition Program Counselors, Rehabilitation Hospitals, etc.). Colleges and university campus centers for person with disabilities within the Lansing and Flint areas were contacted by phone for recommendations and for passing on the information to their students.

In some cases an implementation team member called or met with community agencies or groups to explain the project more in-depth so that questions about the opportunity could be clarified. For example, a meeting was set with a local Rehabilitation Services staff manager to ensure that rehabilitation case workers were informed enough about the opportunity to pass the information onto their clients. In some cases, individuals who were known by our partners were identified as potential good matches for BAD-L and were contacted directly.

To recruit mentees from the Flint area, we needed to make our recruitment efforts much more intentional. It was discovered that there were a couple of main sites that people with various types of disabilities utilize so those sites needed to first be identified (Community Mental Health, and the Center for Independent Living). From those sites we used the snowball technique to ask others to identify who else should be contacted or personally invited to participate. From there phone calls and emails were used to recruit individuals recommended. Once interest was demonstrated the flyer and application was sent to the individual for consideration and they were asked to fax, email, or snail mail the materials to MDRC.

To recruit mentors, we sent letters to our partner organizations and asked them to make recommendations and provide us with contact information. Individual phone calls and emails were also distributed to identify the best pool of mentors possible by recommendation. We used the snowball technique for recruiting mentors as well. Once interest was demonstrated the flyer and application was sent to the individual for consideration and they were asked to fax, email, or snail mail the materials to MDRC.

Deadlines for application submission were created but continually revised through the recruitment process as we realized we were not receiving enough applications to choose from.

Application Review Process

Application materials were designed to provide information that would assist the implementation team in determining whether the applicant was the best fit for BAD-L. Aside from basic contact information, the application was meant to assess motivations for wanting to participate, the community issue they were interested in addressing, the leadership skills they wanted to learn more about, and whether they knew of any good mentors we should contact.
Once applications were received, each individual that submitted was contacted for a brief phone interview to assess the type and amount of leadership experience they had and an understanding if what they wanted to learn could be gained through the BAD-L project. Interview questions included: Why do you want to participate in this project?; What does the word “leadership” mean to you?; What skills do you think a leader has?; Describe an example of when you feel you have been a leader in your life?; Describe your leadership style and who were your followers?; Tell us about your experience(s) with the disabilities community; and How would you describe an ideal mentor/mentee relationship? What roles would you like to see your mentor play?
A review team discussed each applicant’s interview content to determine their acceptance or denial. Acceptance of a mentee as a participant of BAD-L was based mainly on 2 criteria: 1) did they have prior personal experiences working to develop their leadership? and 2) did they have an interest in a community change initiative they were highly motivated to address that related to the needs of the larger disabilities community?

We had a more difficult time recruiting mentors. People who understood the disability rights experience or who were recognized leaders themselves were very busy, and although interested in the project not necessarily motivated to take on another thing to do. Ultimately we identified potential mentors by the facilitators tapping their existing social networks.

LEJUSTE THREE DIMENSIONS OF LEADERSHIP DEVELOPMENT

The model of leadership development used by Connections to Community Leadership is based on the idea that leaders develop skills with practice. There are three components of leadership skill building – Self, Community, Visionary. *(figure 1)* This model is not a developmental model, each piece acts to improve the skills in the two other parts.

<u>Leadership as Self</u>
The focus of leadership within the self is to grow and deepen a sense of self-esteem, self-confidence, and self-awareness. These characteristics live inside a person and are necessary to the development of a strong leader. As an individual comes to trust their ability to make choices, to understand their current situation, and to know their impact on other people and the world, they will be more likely to step up to leadership responsibilities.

<u>Leadership and Community</u>

Working together as equals on a specific project offers a kind of laboratory for individuals to practice a variety of leadership skills without having to assume a formal role as "leader".

Within the group the peer members build relationships with each other based on cooperation rather than a chain of command. They participate together in conversations about their experiences as members of a shared social/cultural group, or perhaps as people who share similar values.

As peers work on a shared project they talk to each other about various issues, they may identify barriers, analyzing information, develop and take action, and consider the outcome of the action. During this activities member of the group become accountable to the task and to each other. They may experience conflict and the necessary conflict resolution. Some will learn basic organizing skills of making cold calls, building partnerships, speaking with the media. Others may find an outlet for already existing skills – writing, art design, hospitality, bookkeeping. Many will move from telling their personal story to articulating a social justice/social change issue, all skills of a good leader.

This shared experience can increase self-esteem, self-confidence and self-awareness. It can also assist some individuals to articulate the voice of the people, a necessary skill for a visionary leader.

<u>Leadership as Visionary Practice</u>
With connection to community and developing an understanding of how the larger social and political system impacts a group, a leader occasionally emerges who has a sense of a larger picture. A successful visionary leader often has a natural charisma or an ability to speak in a way that is easily understood that encourages people to follow. This person knows how to capturing an idea and capture an audience.

Some skills of a visionary leader can be learned. A visionary leader is able to listen to others and indicate that he/she understands what they hear. A visionary leader can learn to articulate the hopes and dreams of the group he or she is leading.

This person inspires movements and helps to develop strategies for significant societal change. A visionary leader continuously deepens the interior skills of self-esteem, self-confidence, and self-awareness. The visionary leader understands that they cannot lead without a community of followers who are willing to put the dream into action. Therefore, the visionary leader seeks relationships with others, is not afraid to promote the leadership of others, and always listens to the experiences of his/her group.

Reflection

Reflection, both individual and in the group is central to learning leadership skills. After an action, a difficult task or meeting, or an emotionally charged interchange, as an individual or a member of the group, we encourage developing leaders to review the following four questions that guide reflection. 1) What just happened? 2) How do you feel? 3) What does it mean? 4) What would you do differently?

Qualities of Leadership

We use 6 qualities of leadership that function in all three components of this model to identify growth in leadership capacity. *(figure 2)* The six qualities are: Worth, Self-Knowledge, Desire, Voice, Action, and Reflection. They can be used as a pre and post measurement for movement of an internal sense of self. They can also be used as a means to measure the effectiveness of various components or specific circumstances of a program. For example, after a participant delivers a successful statement at a public hearing, or a group works through a particularly difficult conflict, answering the questions could provide information about the effectiveness of an activity or intervention.

The Lejuste Three Components of Leadership Development is a model of practice. Leadership skills cannot be learned only from a book or in isolation, but at some point the skills must be practiced, the emerging leader must reflect and learn from that practice. No component comes before another component rather each part recognizes and strengthens the skills identified in the other two components.

Figure 1

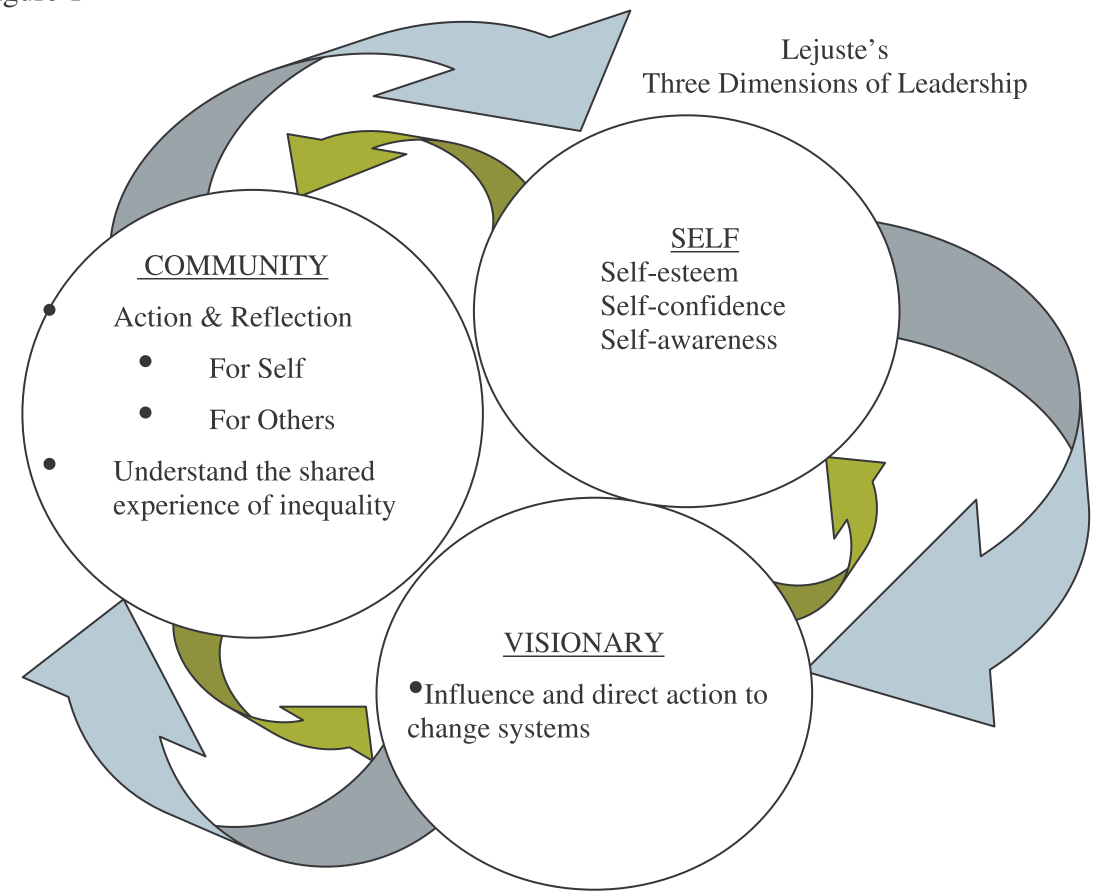


Figure 2

	Self-Determination	**Community Membership**	**Visionary Leadership**
Worth	I am worthy of respect	I am worthy of joining others	I am worth listening to
Self-Knowledge	I know my strengths and limitations.	I know what I have to offer others.	I know what my group can do.
Desire:	I know what I want.	I know what my group wants.	I know what needs to be done by my group.
Voice	I speak up for myself.	I am part of a shared voice.	I can voice my group's issues.
Action	I take action	I take action with others.	I lead my group's actions.
Reflection	I reflect and learn about myself	I reflect and learn about my group	I reflect and learn about my leadership.

Slide 1

Leadership Development and Participatory Action

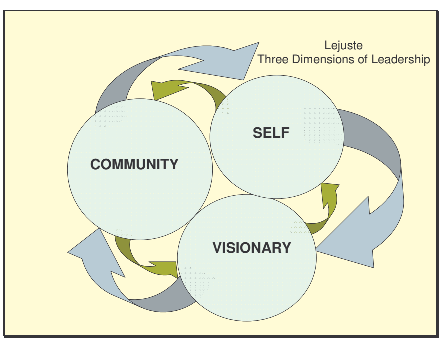
Lejuste Three Dimensions of Leadership

Slide 2

3 repeating components of leadership skill building

- Leadership within Self
- Leadership in Community
- Leadership as Visionary Practice

Slide 3



Slide 4

Leadership within Self

- Assumes a trust of self and a comfort with making choices
- Expressed by evidence of:
  - Self-Esteem
  - Self-Confidence
  - Self-Awareness

Slide 5

Leadership and Community

- Peers working together
  - Personal experiences and knowledge to the group
  - Build relationships with each other based on cooperation rather than a boss/employee model
  - Share conversations about their experiences as a member of the disability community
  - Agree to describe the shared experience

Slide 6

Leadership and Community

- Working on an agreed upon project
  - Experience sharing ideas, working through differences of opinion, learn to communicate, accept responsibility to follow-through
  - Understand the power of leading and following
  - Analyzes information, develops an action plan, *reflect* on the outcome
  - Share *reflection* can increase self-esteem, self-respect, and self-awareness

Slide 7

Leadership and Community

Reflection Questions:

What just happened?
How did it make you feel?
What does it Mean?
What would you do different?

Slide 8

Leadership and Community

Individuals may develop specific skills:

- Speaking with the media
- Organizing volunteers
- Paying the bills
- Developing work plans and paying attention to details

Slide 9

Leadership and Community
Leaders as Followers

- A follower is not a person but a role
- Following does not mean giving up your power, it means joining your power with another person
- Listen well to others
- Join in someone else's idea
  - Better to say "Hey, I'll support you"
  - Than "what ever" or "that's fine"

Slide 10

Effective Followers

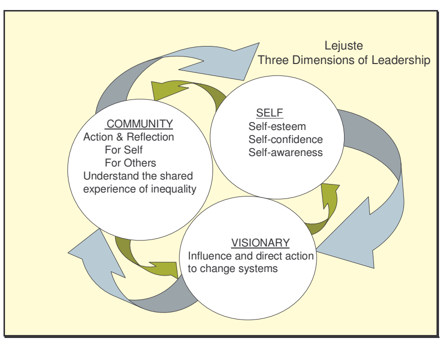
- Manage themselves well
- Are committed to the group and to a purpose, principle, or person outside themselves
- Build their skills and focus their efforts for maximum impact
- Are courageous, honest, and credible

Slide 11

Leadership as Visionary Practice

- A person develops an understanding of what is present in the social system that continues to hold their people back
- Talents Include:
  - Capturing an idea
  - Capturing an audience
- Inspires movements and develops strategies for significant societal change
  - Supported by “followers”

Slide 12



Slide 13

3 Components, 6 Qualities

- Worth
- Self-knowledge
- Desire
- Voice
- Action
- Reflection

Slide 14

Comparative Outcomes

	Self-Determination	Community Membership	Visionary Leadership
Worth	I am worthy of respect	I am worthy of joining others	I am worth listening to
Self-Knowledge	I know my strengths and limitations	I know what I have to offer others	I know what my group can do
Desire	I know what I want	I know what my group wants	I know what needs to be done by my group
Voice	I speak up for myself	I am part of a shared voice	I can voice my group's issues
Action	I take action	I take action with others	I lead my group's actions
Reflection	I reflect and learn about myself	I reflect and learn about my group	I reflect and learn about my leadership

Slide 15

Contact Information

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- MDRC, Feisty and Non-Compliant

In Praise of Followers

"In Praise of Followers" by Robert E. Kelly published in the Harvard Business Review can be downloaded from the Amazon website for $6.50. http://www.amazon.com/Praise-Followers-Robert-E-Kelley/dp/B00005RZ28

BAD-L

Appendix 3: Additional Activities and Binder Resources

- Topic and Goal Presentations
- Theater of the Oppressed
- Running Meetings
- Ladder of Inference Activity
- Our Systems Analysis
- Conducting Meetings
- Talking to Public Officials and Decision Makers
- Rules to Running Meetings
- Coalition Building

"Most of the things worth doing in the world had been declared impossible before they were done."
~ Lois Brandeus

Introduction to this Appendix

As often happens, the six-person team that conceptualized this curriculum found themselves over- ambitious. We were limited by time and money resources. With more resources we would have included the material in this section. We include these materials for those of you who have more resources or for use in adjusting the BAD-L curriculum to meet the needs of your unique participants.

TOPIC AND GOAL PRESENTATIONS

(60 minutes)

At the last training, pairs were asked to work together over the break to agree upon a topic and goal for their community project.

Have the participants get into their emerging/seasoned leader pairs. Now, have them get into groups of 4 pairs (8 people per group). Have each emerging/seasoned leader pair spend no more than 10 minutes telling their small group about their community project topic and goal. Their presentation should include: 1) what issue they are targeting, 2) why they are targeting that issue, and 3) two things they want to do about the issue. If they are still undecided, the pair may use this time to bounce their ideas off the large group and get ideas that may help them in reaching a decision. If needed, this is also an opportunity to help participants scale down their projects to something realistic.

BUILDING A GROUP FOR SOCIAL JUSTICE

(60 minutes)

Although we would hope that each meeting is successful, it is especially important the first time you bring a group together. If you take the time to make this a successful meeting there is a better chance that individuals in your group will make a commitment to you and your project and to each other.

Participant binders include information regarding running successful meetings. We encourage you to review this document for a better understanding of content, design, and process. The first meeting, however, needs additional attention.

Ask participants to individually read the sections of the binder relating to meetings. While reading, have them circle or underline statements that draw their attention.

The Goal

You have two overarching goals for the first meeting. 1) get to know who is in the room and 2) energize the people for the issue.

What ever your issue or project the goal of the first meeting is to build energy for the project and to get a core of people to commit to coming back to the second meeting. (Warning: You will never have as many people at successive meetings as you have at your first!) People want to be acknowledged as important to the group. They want to become comfortable with each other. They want to hear what you have to say about the project and offer their ideas and assistance. Take everyone seriously, everyone has something to offer.

Before the Meeting

Participants

Reach out to each person you want at your meeting with a personal invitation. If possible meet with them individually, and offer background on your project issue, why the project is important to them, and how much you would appreciate their presence at your meeting. If you cannot meet with them in person, spend time with them on the phone. Ideally this outreach would happen a few weeks before the meeting. You may want a second, follow-up friendly phone call after your first meeting.

Send out personal invitations to the people you wish to be at the meeting a week to ten days prior to the meeting. An informational flyer with a hand written message is usually well received. Ask for RSVP on the flyer, but don’t expect to receive them in a timely manner.

Two to three days before the meeting begin to call people to inquire if they are going to be present. Let people know the time, that there will be refreshments, and ask if they need transportation or could provide transportation to someone else. No matter how tired you are, you need to reach out to each person with energy and enthusiasm for them and the project.

A way to assure some attendance is to ask people to help you host the first meeting. If you are focusing on the content of the meeting, others can focus on the hospitality. Ask people to come early and set up the room, coffee, or bring food. The more people who have responsibility for the success of the meeting, the more people will engage in the product and the outcome. You will also build support for when things are not working out as planned (this will happen).

Logistics

You need a place to hold your meeting. Remember, depending on the season, it is wise to reserve a room when you are first thinking about the need for a meeting.

Your local library or credit union has free community rooms. As you are reserving a room check for the following: accessibility (including access to a bus line), the rules around food and drinks, and for the availability (and sometimes cost) of AV equipment, and kitchen. A community church or synagogue will often have rooms for free or low cost. It is always wise to visit the site if you have not already. There is a resource in Appendix 3 called running a meeting which has a section on accessibility of meetings. Accessibility is also covered in the next session under Running a Meeting. Need to pick where and when to talk about accessibility.

The Meeting

Arrive, with your help 30 – 45 minutes before the meeting is scheduled to begin. Be prepared to set up not only the refreshments, but also the room, and building (if signs are needed to direct people to the meeting).

As people arrive great each one individually, ask them to make a name tag, and invite them to the refreshments. You may also introduce them to each other, if there is time. Your helpers can also be asked to help with inclusion.

Begin the meeting with a go around of introductions. If later comers arrive after introductions, find a natural pause in the agenda that asks for their introductions, and allows another go around of people saying their names.

Your agenda should focus on people getting to know each other and the reason you have called the meeting. The more you accomplish this by the group talking and you being silent, the more likely they will come back.

As you end the meeting (this should be on or near the announced time) ask that the people interested in continuing to work on the project sign a contact list. Announce the tasks needed to call another meeting. Give as many responsibilities to the participants as possible. Your responsibility will be to keep in contact with participants and remind them of their responsibility.

After the first meeting
Phone everyone who attended, thank them for their participation, and ask their opinion of the event and the issue. If they volunteered for a task at the next meeting ask if they need anything from you to complete the task. Remind them that you are available if they need anything. Continue to stay in at least phone contact with as many people as you can. Pay special attention to the people who helped in prepare the first meeting and who volunteered to help for the second meeting. Share your ideas and listen to theirs. Ask for help as you put together the next agenda.

Activity
Have participants break into small groups and discuss their overall impression and the items they identified as things that drew their attention.

Next, come back as a large group and have a few groups report back on their discussions.

PROUD AND POWERFUL

(90-120 minutes)

Replacement Theater

Replacement Theater (sometimes called Theater of the Oppressed) uses real life stories of the people in the room to practice resisting oppression. Stories are acted out by participants. One person acts as the "joker" and when the scene is played, stops the action and asks the audience "Is this right? What is going on? What should the person being hurt say?"

As audience members throw out suggestions the Joker invites the suggester up to the stage with the instruction to "try that idea out".

The actor playing the person resisting the oppression sits down, the scene is replayed, and the audience member tries the idea. When the idea is tried the Joker once again asks the audience if the new idea is working, if not another audience member is brought to the stage. The remaining actors keep up their roles until an idea is tried that stops the oppressive action.

The audience discusses the experience.

Explanation and Demonstration of Replacement Theater:
Facilitators demonstrate acting out a personal story of oppression. The Joker interrupts and the audience is invited to play

Have the participants break into small groups and share personal stories of a time when you were oppressed by another person or when you observed oppression.

Have the group choose one story to act out, and rehearse the scene. Remember to assign one person to be the Joker. Have the participants present the scenes and practice interrupting the oppression.

Examining the Dynamics of Oppression

Oppression: 1 a: unjust or cruel exercise of authority or power b: something that oppresses especially in being an unjust or excessive exercise of power

Oppress: to burden spiritually or mentally : weigh heavily upon.

The dynamics of oppression work at both an individual level and the larger societal level, by the way our culture is structured. At each of those two levels people are oppressed by others and by themselves (learned attitudes and values).

The societal structure gives preference to individuals who function as able bodied, and able-minded. The physical barriers to community access are ignored by those of us who can climb steps, sit in narrow chairs, and/or reach into cupboard above the sink. The emotional and intellectual barriers to community participation are evident in our assumption of the ability to read, our ability to hold down a nine-to-five job, and the ways we value intellectual intelligence over emotional intelligence. This is the ways in which our society and culture are structured.

Because we exist in this environment we are given messages, outright and subtle that tell us where we are placed on a continuum of value. We know our value from early childhood. The messages about out worth teach us behaviors that make us use power in an unjust way and that, at the same time, teach us to accept unjust treatment of ourselves and others. We in fact, burden ourselves and/or others spiritually and mentally. We conspire with the dynamic of oppression.

As a large group, discuss the experience using the following questions:

- How can we insert resistance to oppression into our disability culture?
- How does this relate to becoming Proud and Powerful?
- How can we use these ideas in our projects?
- How can we talk about the issue of oppression in the wider world?

RUNNING MEETINGS

(30 minutes)

Refer participants to the sections of their binders called, "Conducting Meetings," "Governing Boards and Advisory Committees," and "Rules to Run Meetings." They can follow along and know it is in their binder for more information in the areas that we do not discuss in depth.

The environment of a meeting can have a huge influence on its members. If members have a positive experience at the meeting, they are likely to return time and time again. However, if they have a negative experience, it is safe to say, they will probably not come back. Effective meetings require planning in advance, both by the chair and the people who attend. There are several things to consider when planning and conducting your organization's meetings, such as alternative formats, agenda items, format, facilitation, etc.

Agendas

It is pretty standard to set agendas for meetings. An agenda is an outline of the topics to be covered during the meeting. Agendas tell the members why the group is meeting and help members prepare for the meeting. There are three main areas to pay attention to when creating an agenda: content, design, and process. *Refer participants to the "Serving on Boards and Committees" section of their binders for a sample agenda.*

Content

Content is the actual items that get listed on the agenda. The content should include the key topics the group or organization wants to address or discuss during the meeting (i.e. introductions, approval of minutes, reports, old business, new business, etc.). The content of the agenda is often determined by the Chair or President of the group; however, it can be beneficial to generate the list of agenda items with members of the group, committee, or organization as well. Doing so, helps create an environment where members feel valued, included, and as though their voice/opinion matters to the group or committee.

Design

Once the content of the agenda has been decided upon, it needs to be put into a logistical order. One may think that the order doesn't matter, but you would be surprised at the unspoken rules of agendas. Often times, whether it is stated or not, people assume that the items that are first on the agenda are, in some way, more important than those further down the list. Even if this is not your group's intention, some individuals may perceive agendas in this light.

Once the agenda items are in some sort of order, you may decide to put a suggested time next to each item. This is done so that every item on the agenda gets the time that it deserves. Often times, members can get talking about the first few agenda items and lose track of time. They then find themselves rushing through the remaining topics. When a time is listed next the item, it can serve as a guideline for how much time to spend discussing that particular topic and the facilitator can use the time guidelines as a way to transition from item to item. For example, a facilitator could say, "I've noticed we have spent 15 minutes on this topic. We would like to take the next 5 minutes to wrap up the discussion before moving on to the next item."

It can also be beneficial to either make copies of the agenda to hand out at the meetings or write them down on a dry erase board or chalkboard so people can follow along. This also allows for late comers to see what they may have missed and seek out that information after the meeting. If your organization chooses to do this, make sure you can provide a copy of the agenda in alternative formats for individuals requesting such a format. (Any additional handouts or materials that will be distributed during the meeting should also be available in alternative formats upon request.)

Process

The process includes how you present each item and how you move through the agenda. Each topic should have a specific approach such as someone reporting to the group, facilitated discussion, brainstorming session, etc. Discussing meeting dynamics at the start may also assist in a smooth process. This could include making sure all members agree on how a decision is made and that each agenda item will be discussed separately. Finally, you may also want to check in with quiet individuals to make sure they have time to speak (without forcing them to speak or making them uncomfortable), and at the same time, confront individuals who may be talking too much and remind them the give others time to speak.

When looking at the process, you may want to ask yourself:

- Are there smooth transitions between topics?
- Are you explaining how you got to this topic and what you hope to accomplish?
- Are members participating?
- Are people staying on topic or jumping all around the board?
- Do members feel their opinions matter?
- Who is doing the majority of the talking?
- Is there positive energy in the group?
- Are people committed to and excited about the task at hand?
- Does anyone look uncomfortable?

Making Room for Everyone

During the meeting you want to make room for everyone to feel comfortable speaking. Some people are naturally comfortable speaking in a group; others are more comfortable speaking to only one or two people. Some people are full of ideas and have trouble remembering to listen to others. Make time in your agenda for people to speak in small groups of two or three, followed by a large group discussion.

When you have a person who is speaking a lot you can: begin with a ground rule that no one speaks twice before everyone speaks once, use silence between calling on people, remind the group to self regulate their comments or, announce the amount of time left and ask to hear from those who have not spoken.

Accessibility

When you are conducting a meeting, it is extremely important that your meeting be accessible to all of your members. Some key requirements for accessible meetings include:

- A physically accessible meeting location
- Have all materials available in alternative formats
- A meeting location that is on a public transportation route
- Keep language simple – avoid jargon
- Take time to meet with individuals who need support – find out from THEM what they need

Many meetings are conducted using Parliamentary Procedures (often called Roberts Rules of Order). *Refer participants to "Rules to Run meetings" to learn about Roberts Rules of Order.*

LADDER OF INFERENCE ACTIVITY

Source: Adapted from "The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization", Peter M. Senge, Art Kleiner, Charlotte Roberts, and Rick Ross, Knopf Doubleday, 1994.

Purpose: To help participants understand the ladder of inference.

Materials

- ✓ Variety of tools, household items, and office supplies (enough for each person to have 1 item)

Directions:

1. Have participants to observe a wide variety of tools, household items, and office supplies that are arranged on a table. *(available data)*

2. Ask each individual to choose one item. *(Select data)*

3. Silently have individuals group themselves, in threes, according to the similarities of the item they have chosen. *(paraphrase data)*

4. Once grouped each individuals share with each other, one word that describes a category of group similarity. *(name what happened)*

5. In your small group, discuss the similarities and differences in the ways that you individually thought about gathering in a like group. Identify the judgments you made about your fellow group members choices.*(explain/evaluate what is happening)*

6. Holding the same object, and working silently, decide if you are in the correct group, look around at the other groups and silently move to where you think you and your object belong. If someone moves into your group, someone else must move out. *(decide what to do)*

7. Once every group is settled, repeat steps #4 & #5. *(if there is time)*

In large group discuss your understanding of the ladder of inference.

OUR SYSTEMS ANALYSIS

Our Targeted Problem:

____

____

Root Causes of our Problem		Example Conditions that are Creating our Targeted Problem or Making it Worse.
	Policies & Procedures	
	Values, Attitudes, Skills & Behaviors	
	Resources	
	Relationships	
	Power/Decision-making	

Example Systems Analysis

Our Targeted Problem: People with Disabilities do not have a voice in their employment decision-making process. They are often put in jobs that they don't like or want.

		Example Conditions that are Creating our Targeted Problem or Making it Worse.
ROOT CAUSE CATEGORIES	**Policies & Procedures**	Caseloads for job counselors are too high – no time to involve their clients in decision-making. Job counselors get rewarded for getting people jobs – not for getting people jobs that they like and keep. State policy does not require "client-centered" planning.
	Values, Attitudes, Skills & Behaviors	Job counselors don't know how to involve people with disabilities in these decisions. Job counselors think they are the experts – they know best how to select jobs for their clients. Some people with disabilities don't feel comfortable voicing their opinions. Some people with disabilities don't fully understand their job opportunities or job desires.
	Resources	There are few job training programs for high school students with disabilities. There is no $$ to support people with disabilities to "try out jobs" through internships or practicum placement. Some employers don't have the resources to fully accommodate people with disabilities.
	Relationships	Job counselors do not have many connections to a diversity of employers. Job counselors are not well connected to the schools.
	Power/ Decision-making	People with disabilities are not represented on the Board of Directors for the Job Agency.

CONDUCTING MEETINGS

This is one section of a larger leadership manual called "Lead On: A Handbook to Starting a Student Organization." For more information or to obtain a copy of the manual, call Connections for Community Leadership at 1-866-532-2669.

The environment of your organization's meetings can have a huge influence on your members. If your members have a positive experience at your meetings, they are likely to return time and time again. However, if they have a negative experience, it is safe to say, they will probably remove themselves from the organization. So, what makes a meeting a positive experience for members? There are several things to consider when planning and conducting your organization's meetings, such as alternative formats, agenda items, format, facilitation, etc.

Agendas

It is pretty standard for organizations to set agendas for meetings. An agenda is an outline of the topics to be covered during the meeting. There are three main areas to pay attention to when creating an agenda: content, design, and process.

Content

Content is the actual items that get listed on the agenda. The content should include the key topics the organization wants to address or discuss during the meeting (i.e. accessibility barriers, upcoming events, advocacy efforts, discussion questions, constitution changes, etc.).

When deciding on content, it can be beneficial to generate the list of agenda items with the executive board, advisor of the group, and other individuals who play an important role in the organization. These people are often very actively involved with the organization and are aware of the topics that should be covered on the agenda. At the same time, it is also important to allow general assembly members to have a part in deciding the content of the agenda. Doing so, helps create an environment where general assembly members feel valued, included, and as though their voice/opinion matters to the organization. This could be done in one of three ways:

1) The agenda is prepared by the executive board and then sent to the general assembly members prior to the meeting with an announcement asking for suggestions/additions/deletions.
2) The agenda is prepared by the executive board prior to the meeting. Then the first agenda item is always "approval of agenda" so the first thing discussed is the content of the agenda itself. During this time, the facilitator of the meeting asks all present members if they have any additional agenda items they would like to have covered and, if so, the members decide where it will be placed on the agenda.
3) The agenda is prepared by the executive board prior to the meeting and there is always an agenda item at the end such as "new issues or concerns," "announcements," or something similar to allow general assembly members the option to discuss anything they feel is important that may have been missing on the agenda.

Design

Once the content of the agenda has been decided upon, it needs to be put into a logistical order. One may think that the order doesn't matter, but you would be surprised at the unspoken rules of agendas. Often times, whether it is stated or not, people assume that the items that are first on the agenda are, in some way, more important than those further down the list. Even if this is not your organization's intention, some individuals may perceive agendas in this light. Therefore, the order of agenda items can be important.

Once the agenda items are in some sort of order, you may decide to put a suggested time next to each item. Organizations do this to ensure that every item on the agenda gets the time that it deserves. Often times, members can get talking about the first few agenda items and lose track of time. They then find themselves rushing through the remaining topics. When a time is listed next the item, it can serve as a guideline for how much time to spend discussing that particular topic and the facilitator can use the time guidelines as a way to transition from item to item. For example, a facilitator could say, "I've noticed we have spent 15 minutes on this topic. We would like to take the next 5 minutes to wrap up the discussion before moving on to the next item."

It can also be beneficial to either make copies of the agenda to hand out at the meetings or write them down on a dry erase board or chalkboard so people can follow along. This also allows for late comers to see what they may have missed and seek out that information after the meeting. *If your organization chooses to do this, make sure you can provide a copy of the agenda in alternative formats for individuals requesting such a format. This also applies to any additional handouts or materials that will be distributed during the meeting.*

Process

The process includes how you present each item and how you move through the agenda. Each topic should have a specific approach such as someone reporting to the group, facilitated discussion, brainstorming session, etc. Discussing meeting dynamics at the start may also assist in a smooth process. This could include making sure all members agree on how a decision is made and that each agenda item will be discussed separately. Finally, you may also want to check in with quiet individuals to make sure they have time to speak (without forcing them to speak or making them uncomfortable), and at the same time, confront individuals who may be talking too much and remind them the give others time to speak.

When looking at the process, you may want to ask yourself:

- Are there smooth transitions between topics?
- Are you explaining how you got to this topic and what you hope to accomplish?
- Are members participating?
- Are people staying on topic or jumping all around the board?
- Do members feel their opinions matter?
- Who is doing the majority of the talking?
- Is there positive energy in the group?
- Are people committed to and excited about the task at hand?
- Does anyone look uncomfortable?

Icebreakers

Many organizations choose to start each meeting with an icebreaker. Icebreakers are fun and interactive ways to have members introduce themselves to each other. They can range from answering a simple question to moving around the room. It is best when icebreakers relate to a topic that will be covered in the meeting or when they encourage members to get to know one another. *When deciding on an icebreaker, please pay attention to your membership and the abilities of people in the room. To make members feel included and create a positive experience, it is important to pick an activity that all members can fully participate in.*

Want more icebreakers? Students in the CONNECT network are full of ideas.

Websites with Icebreaker Activities

- *Wilderdom* - http://wilderdom.com/games/Icebreakers.html
- *Education World* - http://www.education-world.com/back_to_school/index.shtml
- *About* - http://712educators.about.com/od/icebreakers/
- *Big Dog Little Dog* - http://www.nwlink.com/~donclark/leader/icebreak.html
- *Kim's Korner* - http://www.kimskorner4teachertalk.com/classmanagement/icebreakers.html
- *Wikipedia* - http://en.wikipedia.org/wiki/Icebreaker_(facilitation)
- *Education World* - http://www.education-world.com/a_lesson/lesson/lesson019.shtml

TALKING TO PUBLIC OFFICIALS & DECISION MAKERS

This is one section of a larger leadership manual called "Creating Change Together." For more information or to obtain a copy of the manual, call Connections for Community Leadership at 1-866-532-2669.

Writing and talking to public officials and decision makers are ways you can let them know what you think about a law or something that is happening that is important to you. There are several ways you can talk to your public officials such as:





- Writing them letters
- Sending an email to your public official
- Participating in electronic campaigns
- Meeting with your public officials
- Talking to them on the phone
- Going to a public hearing
- Inviting public officials and decision makers to your organization

SNAPSHOT

- How to talk to public officials and decision makers about what is important to you

REMEMBER: It is always a good idea to talk to public officials and decision makers when they do things you like – not just when they do things you don't like.

Write Letters

As an advocate, most of your letters will be written to accomplish a simple and specific objective such as: to request a meeting, to request information, to make an appointment, to express your opinion, or to thank someone. A letter is the best way to make such requests since it is more likely to get a response than a telephone request is. Letters are also effective ways to communicate because by putting your message on paper, you force yourself to organize your thoughts and give yourself time to edit it so that the message is exactly what you intend to say which is its most powerful form.

These letters should be short and to the point. In addition, a personal story that lets the person you are writing to see the importance of the issue from your point of view can be very powerful. Your letter does not have to be long or complicated. Your letter will let the person you are writing know that one of her or his constituents is concerned about an issue.

When writing a letter, remember:

- Get your facts straight. Only use correct information.
- Keep your letter short and to the point.
- Use your own words. Form letters can work, but add a paragraph with your own words.
- Don't make threats.
- Write simply and clearly. Keep in mind that the person reading the letter may not know the information as well as you do.
- Don't forget to put your name and return address on the letter.

The best letters are:

- **Substantive –** Use facts to show how the issue impacts your personal life, your business, your customers, employees, and community. Include fact sheets, brochures, or other documents supporting your position.
- **Specific –** Do not assume the person you are writing knows the issue. Start from "A" and go to "Z." Even if the person knows the issue, he or she may share the letter with someone else who does not know the issue. Provide facts and specific information.
- **Timely –** Write when the issue is up for a hearing or a vote. Also write when you know an issue will become a "hot" topic in the government.
- **Brief** - Try to keep your letter to one page (one-sided), and never go beyond two pages.
- **Personalized** - If you work for an organization, check and see if you can use their letterhead. Also, add a personal story to the letter explaining how the issue affects you personally.
- **Polite –** Calling an elected official or decision maker a jerk or stupid is a bad idea. Even if you disagree with them, state your points politely and respectfully.
- **Focused –** Limit your letter to one or two issues. Make your position and issue clear in the opening paragraph, and use the rest of the letter to support your argument.
- **Action Oriented –** Your letter must include a clear call to action that tells the elected official or decision maker what you want them to do – vote yes, look into the issue, etc.

Materials and Style

Your advocacy letters are business letters and should be consistent with standards for good business letters. You should use plain white printing/copy paper or simple stationery with your name and address printed on them. To ensure that your letter is easy to read and looks professional, you should type it on a computer (or ask a friend or family member to help you type it on a computer). Use a business style in setting up your letter. If you are not sure what a business style looks like, pay attention to the style of the sample letters in this manual. When you are finished with your letter, make sure to carefully check if for any spelling errors, grammar errors, or missing punctuation. Careless errors will decrease your credibility and may cause your reader to conclude that you are not serious enough about your request so make sure your letter is correct.

What Goes in the Letter

It is a good idea to make a short outline or list of points you want to include before you write you final copy of the letter. This will help you organize your thoughts and will result in a well-organized letter. There are some key things that should go in every letter. These include: date, contact information, bill number (if writing a legislator), reason for writing, why you support or oppose the issue, a request for a response to your letter, and a thank you.

Who to Send the Letter to

Date

Senator's Name
Address
City, State, Zip Code

Dear Senator:

Bill number: If you are writing about a bill, give the number of the bill.

Reason for writing: Tell your personal story and how the issue affects you, your family, and your community.

Why you support or oppose the issue: State the reasons for supporting the issue or why you are against it.

Ask for a response to your letter: Ask the person to respond and to tell you her/his opinion on what you are writing about.

Call to action: Clear statement of what you are asking them to do.

Thank the person: Thank the person for their time and also thank them if he or she has done something you think is right.

Sincerely,

Your Name
Address
City, State, Zip Code
Phone Number
Email Address (if you have one)

It will take longer to get a response to your letter if you send it to the wrong person or if you address it to an agency rather than a specific person within the agency. If you are unsure as to whom the letter should be addressed, call the agency and ask them to give you the name, correct spelling and title of the person who handles the type of request you plan to make in your letter. Make sure you have the correct address and a telephone number to use in following up on your letter.

Always make sure to keep a copy of the letters you send for your records. We recommend that you send the letter by certified mail and request a return receipt so that you know the letter was delivered and accepted. Keep the receipt as part of your record. It's also a good idea to note the date by which you expect your reply on your calendar or in your records. If you do not receive a reply by the date requested, call to find out when the person will respond to your request. If necessary, write a second letter pointing out the fact that you have made a request but have not yet received a reply.

On the following pages are several sample letters written as part of an advocacy plan.

Having Someone Write on Your Behalf
TIP: When you ask someone else to write on your behalf, it is a good idea to have a draft letter – or at least talking points or key messages – for them to use as a guide.

Individuals who may write on your behalf include:

- Your Board members
- Your satisfied consumers
- Co-workers or other members from your group
- Representatives from local community boards
- Community members
- Family members
- Your agency director

May 12, 2006

James E. Dough
Director of Special Education
Sante Fe School District
1802 East Maryway
Sunnyville, MI 46501

Dear Mr. Dough:

I am the parent of Julia Smiles, a first grader at Central School. I suspect that Julia may have a learning disability. Please evaluate Julia to see if she is eligible for special education services.

Please tell me in writing when the evaluation will be done and who will perform the evaluation so I can give written consent. I look forward to hearing from you within a week regarding your plans for Julia's evaluation. Please send your letter to me at the address below.

Thank you for your cooperation in ensuring the best education for my daughter.

Sincerely,

Jane Smith
364 Landscape Street
Sunnyville, MI 46501
(123) 555-3259

CC: File

January 2, 2007

Ms. Sandy Loves
Michigan Rehabilitation Services
Handiville, MI 45239

Dear Ms. Pate:

I am a client of your office. I am interested in receiving a copy of your agency's written policy on financial assistance for clients who wish to earn a college degree. I understand that this policy is a public document and that I have a right to review and to receive a copy of it under the Michigan Freedom of Information Act (MCLA 15.231 et seg). I would be happy to pay a reasonable cost to cover Xeroxing and postage, if this is necessary.

Please send the information to me at the address below. Thank you for your prompt response to my request. I look forward to hearing from you by January 16, 2007.

Sincerely,

Mark Mouth
1 Happy Lane, Apt. #7
Handville, MI 45239
(123) 555-9651

CC: file

April 12, 2007

The Honorable Valde Garcia
Michigan State Senate
PO Box 30014
Lansing, MI 48909-7514

Dear Senator Garcia,

I am writing you today to encourage you to support legislation that provides funding for the Michigan Housing and Community Economic Development Fund. Michigan's Housing and Community Development Fund is a $100 million annual fund that will help transform our economy by improving the quality of life in Michigan's cities, towns and villages creating vibrant communities where people want to live, work, play and retire. Building and sustaining vibrant communities is central to any plan to revitalize Michigan.

Michigan's Housing and Community Development Fund is about **investing in people.** It's about investing in a better quality of life for all of our people. It's about moving our working homeless population off the streets and into a stable home environment. It's about providing our citizens that are experiencing homelessness with safe, supportive living conditions.

Michigan's Housing and Community Development Fund is about **housing an economically diverse workforce.** It will increase the supply of affordable, accessible market rate housing. It will help provide a stable home environment for families. It will provide safe, high-quality housing. Safe, quality housing, both owned and rental, is the critical missing piece in transforming our economy. States with healthy economies see the connection between job growth and housing. People with disabilities need access to safe, affordable, accessible housing.

Michigan's Housing and Community Development Fund is about **job creation, workforce retention, and economic development.** It's essential for Michigan's economic future. It builds vibrant cities, towns and villages that will attract and retain the changing workforce. It is estimated that housing developments will have a return of 1:3 and community development projects a return of 1:2. A $100 million program will leverage an additional $280 million, would create more than 6,000 good-paying jobs and will generate approximately $21 million in state and local taxes.

I would like to know your position on legislation that provides funding for the Michigan Housing and Community Economic Development Fund. You can send your position to me at the address below. Thank you for your time and attention to this matter. I look forward to hearing from you soon.

Sincerely,

Your name and address

November 1, 2006

The Honorable Valde Garcia
Michigan State Senate
PO Box 30014
Lansing, MI 48909-7514

Dear Senator Garcia,

I am writing to ask you to support HB 5389, which will allow the creation of Single Points of Entry (SPE) for us to learn about and use Long Term Care (LTC) efficiently. This bill has already passed in the house, and now we need your support. I want choice over where I get long-term supports, when and if I need them, and I want those same choices for my family.

Long Term Care has become so complicated that good information is just as important as need in setting up the right kind of LTC supports. An SPE can do that without the bias of financial interest that providers have.

Please vote for real LTC Choice. Support HB 5389.

Sincerely,

Sally Sun

526 Advocacy Street
Voices, MI 43169
(123) 555-1137
sallysun@aol.com

Addressing the Letter
When writing to your elected officials, be sure to properly address them. Here are the proper ways to address some of the elected officials you may want to write to:

Federal Government Elected Officials

President of the United States

The President
The White House
Washington, D.C. 20500

Dear Mr. President,

Senator in U.S. Congress

The Honorable <u>your senator's name</u>
United States Senate
Washington, D.C. 20510

Dear Senator <u>last name</u>,

Representative in U.S. Congress

The Honorable <u>your representative's name</u>
United States House of Representatives
Washington, D.C. 20515

Dear Congressman or Congresswoman,

State Government Elected Officials

Governor of Michigan

The Honorable <u>Governor's first and last name</u>
Governor of Michigan
State Capital
Lansing, MI 48909

Dear Governor <u>last name</u>,

State of Michigan Senator

The Honorable <u>your senator's name</u>
Michigan State Senate
PO Box 30014
Lansing, MI 48909-7514

Dear Senator <u>person's last name</u>,

State of Michigan Representative

The Honorable <u>your representative's name</u>
Michigan House of Representatives
PO Box 30036
Lansing, MI 48909-7536

Dear Representative <u>person's last name</u>,

Phone Calls

Phone calls are the quickest way to let elected officials know how you feel about something. Phone calls are usually used when an issue requires urgent attention or during a crisis. When you call an elected official, you may not be able to talk directly to that person. Most likely, you will talk to a person who works for the official. The person you talk to is responsible to make sure that the elected official knows that you called.

When you call, be sure to:

- Tell the person your name and why you are calling
- Tell them what you think about the issue you are calling about
- Ask for a written answer to your call
- Give the person your name and address
- Get the name of the person you talked to

Calling an Elected Official

Here are a few key points when placing a phone call to an elected official:

- Call the legislator at his/her State or district office. Lawmakers tend to be in Lansing Tuesday to Thursday. Call during normal business hours – 9:00 a.m. to 5:00 p.m.
- Though it is better to talk to the legislator, it is okay to talk to their staff person. Many elected officials rely heavily on their staff person.
- Legislators have phones at their desks and on the floors of the House and Senate. If a legislator is in session, and you really need to talk to him/her, ask to be forwarded to the floor phone. (This is especially important when a critical floor vote on your issues is about to occur.)
- Do not hesitate to call an elected official at home if the matter is urgent or you have been unable to reach her/him in Lansing. Lawmakers tend to be in their districts from Friday through Monday, when the Legislature is not in session. Lawmakers are elected by the public to represent the public, and most welcome – or at least expect – phone calls at home.
- Most elected officials have cell phone. Ask for the number.
- The same principles that apply to writing a good letter, apply to making a good phone call. A good phone call must be:
    - Substantive
    - Comprehensive
    - Timely
    - Brief
    - Polite
    - Focused
    - Action Oriented

You can follow up your phone call with a letter to tell the elected official more about how you feel about the issue.

Letter Writing Campaigns

It is always better to have many voices saying the same message to a legislator. This have been proven to be more effective. Think about it – if your legislator receives numerous letters on the same issue, he or she is forced to recognize that it is an issue of concern to their constituency, and in turn, will act on it. Even a few voices can have a significant effect. As one Michigan Legislator put it, “If I hear from one person, I have to acknowledge that people are thinking about it. If I hear from five or six people, I really have to sit up and take notice!”

Therefore, letter writing campaigns can be very effective. It is a network of people whom you can contact when issues of concern to you and your organization arise. If done correctly, letter writing campaigns can have a significant impact on policy makers’ understanding constituents’ needs and gives each individual an opportunity to emphasize their point with a personal story and first-hand knowledge of the issue.

One of the most effective ways to start a letter writing campaign is to distribute an action alert to provide briefly the background information, desired course of action, and targeted individuals. In your alert:

- **Be brief.** In one (no more than two) pages, discuss the issue or legislation.
- **Call for immediate action.** Spell out exactly what action is necessary, and the timetables involved.
- **Provide a sample letter.** Be sure to stress, however, that sample letters should be used only as a guide or template. Personalized letters expressing individual experiences and perspectives are more effective that “form letters.”
- **Distribute the alert to the broadest spectrum possible.** If time permits, mail to potential allies or ask for mailing lists from organizations and coalitions who share concern on the issue. You may also ask organizations and coalitions to send the action alert to their members.

With the rise in use of computers and emails, several organizations use computer software to create electronic letter writing campaigns. The organization will pick an issue important to their community. Then community members can create an account with the software program and it will automatically create, write, and send an email to your representatives about that issue.

One example of an electronic campaign is GetActive. GetActive is a program that allows participants to send a composed or personally constructed letter to their legislators with just one click of a button. For example, an individual can go to the GetActive website and create an account. Once the account is set up, the individual can view information on different policy issues relating to people with disabilities. When the person finds an issue important to them, they can take action by sending a letter to their legislators (GetActive will even identify their legislators for them).

GET ACTIVE

To learn more about GetActive, visit http://www.dnmichigan.org/get_active.aspx

To join GetActive and start sending letters to your representatives, visit http://ga3.org/mdrc/join.html.

Meet with an Elected Official

You can meet with an elected official, or someone who works for the elected official, in person at any time because you are a citizen and a taxpayer. Elected officials appreciate visits from their constituents. Often, constituents will sit in the House or Senate balcony as guests of their legislator, who will announce her or his guests to the other members. This is a good opportunity to see your legislators in action on their turf, and carry your messages to them as well. Try to visit your elected official at least once a year.

You should always make an appointment before you go. You can make an appointment by calling or writing. Say why you would like to met and for how long you would like to meet.

You will probably meet with a staff person who works for the elected official. Meeting with your elected official in a small group may be easier than going alone.

When you meet with an elected official:

- Always say who you are and why you are there. If you are representing a group, say so.
- Talk about the importance of the subject to yourself, your family, and your community.
- Answer any questions the person has. If you do not know the answer to the question, tell the person you will find out the answer.
- Thank the person for her or his time.
- Leave written information about what you talked about if you have any.

TIPS for meeting with an elected official:

- You will usually have 5 to 15 minutes for the meeting - - Be on time!
- Do not take up more tie than you were given!
    - If your appointment was for 5 minutes, make sure you only use 5 minutes of time.
    - If you are not done talking after 5 minutes, offer to leave information or schedule another appointment.
    - If the staff person says you can stay for 5 more minutes, thank the person and finish your visit in the next 5 minutes.

After you meet, be sure to follow up with a thank you letter. In this letter, thank the person for meeting with you, state briefly your feelings on the issue you talked about in your meeting, and ask for a written response.

You can also invite an elected official to visit your organization. You can invite them to events your organization is hosting, or you can ask them to come and answer your questions.

10 Easy Steps to a Successful Legislative Visit

1. **Arrange a visit.** You should call or send a letter of introduction. Include information on your subject area and background of your organization (if you belong to one). Request an appointment to discuss your ideas or explain why their support on this issue is so important. Legislators are in their districts on a schedule, so call their office to make an appointment.

   Do not be discouraged if occasionally your appointment is attended by a staff member instead of the legislator. The staff are often more informed on certain issues of concern to you, and they have influence over their boss, if the argument is compelling. Building a relationship with the staff *and* your elected official can be quite beneficial, opening more doors for you in the future.

2. **Plan for your visit.** Organize a short presentation before you go to the meeting. If you are going with a group, get together before the meeting to map out your strategy. Assign each member of your group a topic to discuss; this ensures that the necessary matters are raised during the meeting. Prepare brief fact sheets and other reference materials for distribution at the meeting, or send them to the elected official before the meeting for background information. Try to include people whom the legislator knows.
3. **Prepare your talk.** Expect only 5-10 minutes to make your case or if you go with a group 20 minutes total. No one wants a song and dance or a chronology of life events (that is why you bring a fact sheet and materials). Include local personal experiences and stories that show the affect your issue has on the community.
4. **Practice.** Tape your speaking points, listen to yourself and critique your presentation and then share it with someone else who knows very little about the issue. Ask that person if they understand the points you are trying to make.
5. **At the meeting,** ask legislators their feelings on your issues – if they do not know the issue, have background materials available and offer to explain and follow-up with answers to their questions. Bring copies of all important materials and duplicates of any information you had sent out before the meeting. Do not depend on them to have kept copies of what you sent.
6. **Don't fudge the truth.** If you do not know an answer, offer to get back with the correct information. By making this promise, it gives you a second change to plug your issue.
7. **Educate – don't preach.** Everyone wants to know "What's in it for me?" As an advocate, your job is to present factual information that educates policymakers and/or their staff about the benefits of allocating resources to your issue.
8. **Do not apply too much pressure.** This is a surefire way to make a potential friend or a definite enemy. First impressions are important. Be assertive, not aggressive (see the section on assertiveness). Listen carefully to their concerns, because ultimately they need to be addressed. If they have a point of view or a concern, note it so you can provide feedback or otherwise deal with their hesitation.

9. **Leave information.** If you have one, leave a business card. Or, leave your name, address, and telephone number on the materials you are leaving for the policymaker and/or their staff.
10. **Send a thank you.** A simple note of thanks goes a long way. In your letter of thanks, recap what was discussed, what was planned for or promised (if anything), and your willingness to provide additional information if needed.

Public Hearings

Public hearings are held when elected officials or public agencies want to know what people think about something they will be making a decision about. For example, your local transportation system may have a public hearing to find out what people think about the public bus service and to hear what people think about the changes the transportation system would like to make to the current bus system.

At a public hearing:

- People take turns talking to the elected officials about their thoughts on the topics being discussed.
- You do not have to talk if you do not want to. You can just listen to what other people are saying.

If you want to speak at a public hearing you need to:

- **Do your research:** Read the actual bill and any available materials on it. Check all your facts and figures. If you or your group are presenting a suggested amendment, be sure that it is complete, accurate, and ready for distribution.
- **Prepare your statement:** You will be given the opportunity to distribute a written copy of your testimony. Be sure that it is clear, concise, and proofread.
- **Sign your name:** Arrive early so you have time to sign up to speak at the meeting. There will usually be someone by the door or at a table whom you talk to about signing up to speak.
- **Time:** Find out how much time you have to speak. There are usually limits on how much time you will be allowed. It is best to keep it short. If you realize the time will not be enough to make all of your arguments, prepare a presentation of highlights and ask to have your full written position and supporting materials be added to the record.
- **State your name:** When it is your turn to speak, tell the elected officials who you are. Also tell them what group or organization you are with (if you are with one).
- **State your issue:** Tell them why the subject being talked about is important to you. Stick to the subject, relating your experience and views directly to the issue.
- **State your opinion:** Tell them why you agree or disagree with what the item being talked about will do.
- **Avoid propaganda:** You are trying to persuade the committee members to adopt your viewpoint – aggressive or obnoxious behavior, or arguments based only on emotion, are only likely to alienate the committee members.

- **Say thank you:** Thank the elected officials for giving you the chance to talk about what you think.
- **Answer questions:** The elected officials may want to ask you some questions. If you do not know the answer to a question they ask, say you do not know, but you will find out for them. Then do it. It is very important to follow up.

Even if you prefer not to testify, your presence at hearings or meetings can be very important in influencing how a committee reports on a bill. It is important to have as many people there on your side as possible. If you or other individuals do not want to testify, you can also just fill out a card with your name and whether or not you support the issue. Then the committee will read the cards which shows the legislators whether the majority of the people in the room support or oppose the issue.

Public hearings are a good way to learn more about a law or change that you do not know much about.

Identifying Your Representatives

There are many ways you can find out who your Senators and Representatives are. 1) Requesting a copy of "A Citizens Guide to State Government," 2) Visiting the government's website at www.michigan.gov, or 3) the phone book often lists your federal, state and local government officials in the first few pages.

Federal Legislators

Congressperson's Name ______________________ District Number ____

Address ____

____

Telephone Number _______________________________________

U.S. Senator's Name _____________________________________

Address ____

____

Telephone Number _______________________________________

U.S. Senator's Name _____________________________________

Address ____

____

Telephone Number _______________________________________

State Legislators

Representative's Name ______________________ District Number _____

Address ____

____

Telephone Number _______________________________________

Senator's Name ___________________________ District Number _____

Address ____

____

Telephone Number _______________________________________

Governor
The Governor of Michigan is____

Address ____

____

Telephone Number ____

Mayor
My mayor is ____

Address ____

____

Telephone Number ____

Remember: It is important to talk with elected officials and let them know what you think about issues that are important to you. They count on your vote to keep their jobs.

Planning Sheet – Visit with Policy Maker

1. Reason for the visit:
What issue are you going to talk with them about?

____

____

2. Why the issue is important:
What personal story will you tell about the issue? What picture can you use to help tell your story? How does the issue affect you, your family, and your community?

____

____

____

____

3. Your position on the issue:
What are your reasons for supporting the issue or why you are against it?
What facts or information support your position?

____

____

____

____

How many people do you represent? Who else supports your position?

____

____

4. Respond to the policy maker's questions:
What questions may the policy maker have? How will you respond to them?

____

____

____

5. Information to leave with them:
What written materials will you leave with them? Do you need to write something? Can you find materials that your allies have written?
If you are supporting or opposing a bill, give the number of the bill.

____

____

____

____

6. Call to action:
What do you want them to do about your issue? What action are you requesting?

____

7. Setting up the visit:
What policy maker are you going to visit? Who can give you what you are asking for?

____

____

Who will be going to see the policy maker?

____

____

Who will make the appointment with the policy maker?

____

What is the time limit? How will you keep your visit to the time limit? (5 minutes is normal for legislators and other elected officials.)

____

____

8. Dividing the tasks:
Who is going to talk about which part?

____

____

____

____

Who will find and bring the information to leave with them?

____

____

____

____

Anything else you need to prepare?

____

____

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Who will send a thank you note after the visit?

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SERVING ON BOARDS AND COMMITTEES

This is one section of a larger leadership manual called "Creating Change Together." For more information or to obtain a copy of the manual, call Connections for Community Leadership at 1-866-532-2669.

Boards, committees, councils and workgroups make many important decisions that affect the lives of people with disabilities. They all have meetings and rules about the ways they run the meetings. If you understand how they run their meetings, you can help them make better decisions.

SNAPSHOT

- What boards or committees do
- How a board meeting works
- Being an effective member.

Governing Boards

Most organizations have a governing board. A governing board is also called a Board of Directors. This is a group of people who make decisions about the organization and how it works.

A **GOVERNING BOARD** is a group of people who make decisions about how an organization works.

Most organizations that advocate for people with disabilities have a Governing Board. Going to a meeting or becoming a member of the Board of Directors are good ways to advocate for yourself, your family, and your community.

There are disability advocacy organizations called Centers for Independent Living (a.k.a. Disability Networks) all over the state of Michigan. Each one of them has a Board of Directors and they are required to have a certain number of people with disabilities serve on them.

The people on the Governing Board are called directors or board members. Directors are either elected or appointed to the Board. People that serve on the Board of Directors must:

- Be interested in the organization
- Be able to work with other people
- Have the time to be on the Board and be willing to work
- Understand what the Board of Directors is
- Understand how meetings are run
- Understand the responsibilities of being on the Board of Directors

Sometimes, a Board of Directors may have committees. Committees are small groups of people who work together to do certain jobs, like fundraising, refreshments, publicity, and transportation. If you become a Board member, you may be asked to join a committee as well. This will mean you are to attend more meetings and have additional responsibilities.

Advisory Committee

An advisory committee gives ideas and suggestions to an organization. They may also give suggestions to the Board of Directors or Governing Board. For example, the Community Mental Health Board has a Consumer Advisory Committee. The Advisory Committee may review policies and plan presentations for conferences. However, the Board of Directors has to approve the policies and give permission to go to a conference.

> An **ADVISORY COMMITTEE** is a group of people who give ideas and suggestions to an organization.

The responsibilities of an advisory committee member are a lot like the responsibilities of members of Governing Boards. The biggest difference is that the advisory committee members make suggestions to an organization and Governing Board members make decisions about the organization.

> Many local transportation authorities have Local Advisory Councils (LAC's). Joining an LAC is a great way to advocate for the accessibility of the public transportation system in your town.

Officers

> **OFFICERS** are Board or Advisory Committee members that have a certain job to do.

Both Governing Boards and Advisory Committees have officers. Officers are the members that have certain jobs and responsibilities. The most common officers include:

- **President** or **Chairperson:** This person runs the meetings and makes other decisions in between meetings.
- **Vice President** or **Vice Chairperson:** This person runs the meeting and makes decisions if the president cannot be there.
- **Secretary:** This person keeps notes of what happens at the Board or committee meetings and writes them up later. These notes are called minutes.
- **Treasurer:** This person keeps track of the money the Board has. The treasurer may pay bills and collect dues. Dues are money that people pay to be part of an organization. Not all organizations have people pay dues.

Board and Committee Meetings

Effective meetings require planning in advance, both by the chair and the people who attend.

Agendas

An agenda is very important. It helps the chair plan the meeting. It tells people why you are having the meeting. It helps members be prepared. The agenda may say how much time will be allowed for each item. The things talked about are called the business of the meeting.

An **AGENDA** is a list of things to talk about at the meeting.

BUSINESS is the items included on the list that will be talked about.

SAMPLE AGENDA

9:00 a.m.	Call the meeting to order	**The president or chairperson starts the meeting.**
9:15 a.m.	Approval of the minutes	**The minutes that the secretary wrote for the last meeting need to be accepted and approved by the Board or committee members.**
9:30 a.m.	Reports President's report Secretary's report Treasurer's report Committee reports	**Reports let everyone know what is going on. For example, the treasurer may give a report on how much money the group has.**
10:00 a.m.	Old business	**Old business is things that need to be talked about from the last meeting. These things will usually be listed on the agenda.**
10:30 a.m.	New business	**New business is anything new that needs to be talked about.**
11:00	Program	**A guest speaker or training activity sometimes is useful for helping the group reach its goals.**
11:45 a.m.	Adjournment	**Adjournment means the meeting is over.**

Committee members get an agenda for each meeting.

Be sure the purpose of each meeting, and each item on the agenda, is clear to the members:

- To share ideas and information
- To generate new ideas
- To make a decision

- To make a recommendation

Build in time to relax and have fun.

Celebrate all the work and decisions your organization has made.

Do not have a meeting unless there is a good reason for the meeting!!!

Being an Effective Member
As a Board or committee member, you are responsible for several things. You need to:

- Attend meetings.
- Arrive on time.
- Make sure you understand the reason for a meeting and come prepared.

Key point: Make a list before you come about the things you want to talk about.

  - Know the important issues.
  - Know what you will say before you talk.
  - List the points that you want to make.

During the meeting:

- Use the agenda to stay on time.
- Be sensitive to the needs of others.
- Raise your hand and wait to be called on.
- Ask questions if you don't understand.
- Stay in meetings until break time or until the meeting is over.
- Work on issues together. You are a team. Everyone counts.

When others are speaking:

- Listen and consider others' suggestions.
- Respect the thoughts, ideas, opinions and decisions of others.
- Listen with an open mind. Don't interrupt.

When you are speaking:

- Use your self-advocacy to speak up about what you think.
- Be sincere and talk from the heart.
- Include everyone – speak to the whole group not just one person.
- Actively engage in the discussion. Share your ideas when the group is making a decision. Clearly express your opinions.
- Try not to waste time by talking about things that are not on the agenda.

Making Meetings Accessible
"How to Support Real Participation"

It is True that:
- Some people have a strong interest in taking part in organization or group meetings.
- It is difficult sometimes for this to happen.
- There are things that can take place to help make it easier for this to happen.

Your Responsibilities:
1. Let the organization or group know if you need support to attend meetings (such as transportation to meetings or help understanding the agenda).
2. Work with a support person (a friend or someone in the organization or group) to prepare for meetings and to get transportation.
3. Know who the contact person is for the organization or group. Call them if you cannot attend a meeting or if someone else is going to go in your place.
4. Let the contact person from the organization or group know if you are having any problems as a member.

The Responsibilities of the Organization or Group:
1. Talk with you about your role and responsibilities as a member or the organization or group.
2. Find out what you may need for support to go to, and take part in, meetings.
3. Help you find a support person to assist you as a member.
4. Make meetings as easy as possible for you to attend and take part.
5. Help find a way for you to give input into organization or group business even if you cannot attend a meeting(s).
6. Keep language simple. Avoid jargon. Seek clarification.

Responsibilities of the Support Person:
1. Help you get ready for meetings.
2. Help you find transportation to meetings.
3. Attend meetings with you and give you support.
4. Follow-up with you around organization or group business.
5. Assure personal assistance is provided, if necessary.

The responsibilities of each person listed above may vary depending on your personal needs and abilities and the way you choose to get support as an organization or group member.

It is the responsibility of you, your support person, and the organization or group to keep in touch with one another to see if there is anything you need to continue to take part as an organization or group member.

For More Information: "See Get On Board and Make a Difference" from Green Mountain Advocates, http://ddas.vermont.gov/ddas-publications/publications-gmsa/publications-gmsa-documents/get-on-board-2003

RULES TO RUN MEETINGS
(Parliamentary Procedure)

This is one section of a larger leadership manual called "Creating Change Together." For more information or to obtain a copy of the manual, call Connections for Community Leadership at 1-866-532-2669.

PARLIAMENTARY PROCEDURE
is a set of rules for running meetings.

Working together is fun but it can also be hard work. Many groups use rules to help things run smoothly. These rules help people share their ideas, make decisions, and run meetings.

Some groups use Robert's Rules of Order.

Robert's Rules help people talk to each other in groups and provide ways for the group to run smoothly. Groups can change these rules to meet their needs and help everyone understand.

Why Use Robert's Rules?

The rules are based on several principles. These principles help groups make good decisions that are fair to everyone. The principles are:

Fairness:

All members have equal rights and responsibilities. Open discussion of every motion is a basic right.

- The majority has the right to decide.
- The minority has rights which must be protected.

Most issues are decided by a majority vote. Matters that affect the rights of the members must carry by a vote of at least two-thirds of the members.

The chair should be fair and impartial.

Clarity:

The rule should help to clarify the issues that are being discussed and the precise proposals that are being decided in a vote.

Only one question at a time can be considered at any given time.

No member can speak until recognized by the chair.

Good Decisions without Wasting Time.

The rules help the group spend enough time discussing a proposed action to make a good and fair decision.

At the same time, groups have a lot of work to do. Members have busy lives. The rules can help the group stay focused, spent time on the important issues and make good use of people's time.

Rules for Small Boards and Committees

Robert's Rules are written for large meetings, like a national conference of delegates, a union meeting, or a convention. Big groups need more strict rules to be fair, clear, and make good decisions. The rules for small board meetings are different from the rules which apply to large meetings. For details about some of the differences, see the "More Information" section at the end of this chapter.

What is a Motion?

A **MOTION** is an idea that you want the board to decide about.

Every member gets to vote on ideas. The board may need to:

- Take an action.
- Take a stand on an issue.
- Approve something.

When you have something you want the board to vote on you make a **motion**. You would say, **"I move that…"** and then say what your idea is.

Once you make a motion, someone must agree that the whole Board should discuss it and vote on it. The person would say, **"I second the motion."**

Once you make a motion, and someone else seconds it, the members can discuss it. When discussion ends, the whole Board will vote on the idea.

If more people say "yes" to your motion than say "no," then the motion **passes or carries**. This means that your idea was liked by most people and the Board will take the action you suggested.

If more people say "no" than "yes," or the vote is a tie, then the motion is **denied or fails.** The Board will not take the action you suggested.

What if I can't remember the Rules?

Sometimes it's hard to remember what to say with Robert's Rules – and that's okay.

Parliamentary procedure has fancy names for many of the rules. Some rules have fancy names that you hear quite often. The most common ones are:

- I move the previous question. This means, "I move to end debate."
- I move that we table the motion. This means, "Let's discuss this later."
- I move to amend the motion. This means, "I want to change or improve the motion."

You do not have to remember the fancy name. You can ask for something in plain English. For example, you can say, "Please explain what that rule means." You don't have to know that it's called a "parliamentary inquiry." Or you can ask the chair to have people raise their hands if you're not sure about the results of a vote.

Handling a Motion.

The steps for handling a motion are:

1. Get permission to speak. (also called "Getting the floor.")

2. A member makes a motion.
3. Another member seconds the motion.
4. The chair repeats the motion.
5. Discussion or debate by the group.
6. The chair puts the question to a vote.
7. The chair announces the vote and the result.

1. Get permission to speak. (Getting the floor)
Before a person can make a motion or speak in debate, he or she must obtain the floor. The member must be recognized by the chair. This gives the person the right to speak without being interrupted. Other members are to listen.

Small boards and committees have different ways to get the floor to make a motion. In some groups people raise their hand and are called on by the chair. In other groups, you just speak up when the previous person stops talking.

In larger bodies, a member addresses the chair to get permission to speak. You may need to stand or raise your hand and say something like, “Madame Chair” and then wait for her to respond. This is called receiving recognition of the chair.

If you don’t know how it is done in your group, just watch the other people. You can get permission the same way that other people do.

Remember, you can only make a motion about a new topic when the group is not considering another topic.

2. A member makes a motion.
Business may be introduced by an individual member or by a committee. Business is always introduced in the form of a motion.

To make the motion you can say: “I make a motion to...” then say what you want people to vote on.

3. Another member seconds the motion.
A second means that someone else agrees that the group should talk about the motion. They do NOT have to agree with the motion.

You do not have to get the floor to second a motion. You can just say: “I second the motion.”

4. The chair repeats the motion.
After a motion has been made and seconded, the chair repeats the motion word for word. The chair states the motion so that everyone is clear what will be discussed. This helps make sure that the wording is correct.

5. Discussion or debate by the group.
The members debate the motion if it is debatable, unless no one wants to debate it. Every member has the right to speak unless there is a motion to limit or end debate.

The President should ask the group, “Are there any comments?” Comments and discussion help everyone to understand what they are voting on.

The group also talks about the pros (good parts) and cons (bad parts) of the issue or idea to be voted on. All discussion needs to be about the specific motion that is being considered.

What if the members want to make changes to the motion?

- Someone can make a motion to amend the motion. The amendment must say exactly what is to be changed. Any member can second it.

> An **AMENDMENT** is a change to something.

- You may only talk about the amendment, not the main motion, until the vote is taken on the amendment.

What if the group needs more time to have discussions or gather information before they vote on an issue?

- Sometimes you may want to wait to talk about an issue at the next meeting. You can ask the group to do this by saying, “I move that we table this issue until our next meeting.” Tabling means that people need more information or need their questions about the issue answered. A lot of issues and ideas get tabled because there is not enough time.
- Sometimes a small committee can help when an issue is too big for the group or the group needs more information on the topic. You can say, “I’d like to have a committee work on this.” This is called a motion to “refer to a committee.”

How does someone stop the talking?

> Moving the **PREVIOUS QUESTION** means you want to end the talking.

- When there has been enough talking it’s time to vote. Then someone can say, “I move we end the discussion” or “I move the previous question.” If 2/3 of the members agree, the talking is over. It’s time to vote.

6. The chair puts the question to a vote.
A. The chair restates the motion.

B. The chair takes the vote:
"All in favor of the motion, say aye."
"Those opposed, say no."

People vote on an idea by either saying **yes (aye), no (nay),** or **abstain**. If someone abstains, it means that she or he is not voting.

Most votes require a majority to pass. The term "majority" means "more than half," excluding blank ballots or abstentions. Any motion which limits the rights of members requires a two-thirds (2/3) vote.

Any member can ask for a count by raising hands if there is uncertainty as to the true result of the vote. In a large assembly, a standing vote may be needed.

7. The chair announces the result of a vote.

A complete announcement should include:

A. Report on the voting itself, stating which side prevailed (and giving the count if a count prevailed).
B. Declaration that the motion is adopted or lost.
C. Statement indicating the effect of the vote.

For example:

- For a vote in which no exact count is taken, the chair might say, for example, "The ayes have it, the motion carries, and the brochure will be published."
- For a vote in which an exact count is taken, the chair might say, "There are 14 in favor and 15 opposed. The negative has it and the motion is lost. No additional funds will be spent on publicity this semester."

Examples of how Robert's Rules Work

Example One: Tabling the Issue

The issue: Public transportation isn't available when we need it.

Sally: I want to write a letter to the City Department of Transportation and ask them to make things better for us.

Mario: Great idea! I second writing the letter.

The President: Are there any comments? What are the pros and cons?

Andre: I'd rather have a meeting with the Department of Transportation in person. I think that would be more powerful than sending a letter.

Dalia: I'd like to meet with other chapters and to see how they are dealing with transportation issues.

Sally: Okay. Let's table writing the letter to find out more information.

Mario: Sounds good to me.

Others: Me too.

President: The issue is tabled until our next meeting. Let's remember to put it on the agenda for next time. Pass me the donuts!

When issues are tabled the officers make sure to put it on the agenda for the next meeting.

At the next meeting the President will bring the issue up for discussion and possibly a vote.

Example Two: Voting on an Issue

The issue: Public transportation isn't available when we need it.

Sally: I want to write a letter to the City Department of Transportation and ask them to make things better for us.

Mario: Great idea! I make a motion to have Sally write the letter for us.

Andre: I second the motion.

President: Are there any comments? What are the pros or cons?

Dalia: I think writing a letter is a great idea. A pro is that we would be able to say exactly what we want.

Sally: Another pro is that we can write to the Director so our message is heard by the head honcho.

Mario: A con is that we wouldn't be able to talk directly with the director. But we don't have money in the budget to travel so writing the letter seems like the best idea for us.

President: Are we ready to vote?

Everyone: Yes.

Now the president guides the vote.

Here are two ways of voting

Voice vote: The President says, "All in favor of the motion, say aye."
Everyone one who agrees with the motion says "Aye."

The President says, "Those opposed, say no."
Everyone who disagrees says "No."

Count of hands: The President asks everyone who votes "yes" or "no" to raise their hands. Then he or she counts the number of hands for each vote.

The largest number of yes or no votes always wins.

President: The motion carries. Sally will write the letter.

Elections

An organization's rules normally give the date for elections, the method of nominating candidates, the procedure for voting, the votes required to elect, and the terms of office. In general the following procedures are accepted:

A. The chair opens the floor for nominations. For example, the chair might say, “Nominations are now open for the office of secretary.”

B. Nominations may be offered from the chair, from the floor, by a committee, or by write-in ballot. In some organizations, especially small groups, a person may nominate himself or herself.
Nominations do not require a second.

C. Nominations may be closed by the chair when it appears that no more nominations will be offered, or they may be closed by a two-thirds majority vote. A motion to close nominations is in order only after a reasonable opportunity to make nominations has been given.

D. Voting is usually done by voice, show of hands, by roll call, by ballot, or by "acclamation" (when only one candidate has been nominated). For example, the chair might say, “All those in favor of Ali for secretary raise their hands.” The chair counts the votes for Ali. Then the chair says, “All those in favor of James, raise your hands.” The chair counts the votes for James.

E. The chair announces the result of the election. For example, the chair might say, “James has been elected secretary.”

Never take a “No” vote. The chair should NEVER say, “All those opposed to James, raise your hands.” This is true even if only one person is nominated.

A majority is necessary for a person to be elected. If more than 2 people are nominated, sometimes no one gets a majority. In that case, you vote again.

Sometimes a vote is taken between just the top 2 candidates. Robert’s Rules says that you should not do that. The vote should be taken, without eliminating anyone who was nominated.

There are exceptions that allow eliminating the other candidates. The bylaws can allow that, or even say that the person getting the most votes is elected even without a majority. The other exception is called “suspending the rules.” If at least 2/3 of the members attending agree, then candidates can be eliminated. Or the person with the most votes, even without a majority. can be elected.

More Information

More Information – Rules for Small Boards and Committees

The rules for small board meetings are different from the rules which apply to large meetings of assemblies or plenary bodies. In general:

1. Members are not required to get the floor before making motions or speaking, which they can do while seated.

2. Motions need not be seconded.

3. There is usually no limit to the number of times a member can speak. Motions to close or limit debate generally are not allowed.

4. Informal discussion of a subject is permitted while no motion is pending.

5. The chair can speak in discussion, make motions, and usually votes on all questions.

6. Sometimes, when a proposal is perfectly clear to all present, a vote can be taken without a motion's having been introduced. Unless agreed by general consent, however, all proposed actions of a committee must be approved by vote under the same rules as an assembly.

More Information About Motions

There are three types of motions:

1. Main motions – the method of bringing specific pieces of business to the floor for a vote
2. Privileged Motions (Undebatable) – may be introduced during the discussion of the main motion.
    a. To fix time and place to which to adjourn
    b. To adjourn
    c. To take recess
    d. To rise to a question of privilege
    e. To call for orders of the day
3. Subsidiary Motions – may modify or dispose of main motions
    a. To table
    b. To call the previous questions (needs a 2/3 vote)
    c. To limit the debate (needs a 2/3 vote)
    d. To extend debate (needs a 2/3 vote)
    e. To postpone definitely
    f. To refer question to a committee
    g. To amend
    h. To postpone indefinitely

There are a lot of rules about these types of motions. For more information about them, see the Simplified Table of Motions, below, or a full Table of Motions on one of the websites.

Some ways to amend a motion are:

- Add words, phrases, or sentences;
- Take out words, phrases, or sentences;
- Replace words; phrases or sentences;

- Substitute whole paragraphs or an entire text.

Only two amendments (primary and secondary) may be pending on a main motion at any time.

To Withdraw a Motion – Before it is stated by the chair, the maker of the motion may withdraw it; after it is stated, he or she may withdraw it if no one objects.

More Information About Voting

There are several different ways to vote:

Voice vote – A vote by voice is the regular method of voting on any question that does not require more than a majority vote for its adoption. A voice vote is taken by calling for the aye's and nay's.
Division – On a voice vote, when you think there is a question as to the result of the vote, you may call out "Division" or "I call for a division." This means you want a rising vote so that accurate count can be made. Anyone may call for a rising vote or a ballot vote.
Show of hands – As an alternative to the voice vote or as a way to verify an inconclusive result, members show their vote by raising their hand. A vote by show of hands should be limited to very small meetings.
Rising vote – Used principally when a voice vote has produced an inconclusive result and as the normal method of voting on motions requiring a two-thirds vote, members indicate their vote by standing.
Ballot – Voting by ballot is used when secrecy of the member's votes is desired. Voting by ballot is sometimes required in certain cases by the bylaws of an organization. Any vote relating to charges or proposed charges against a member or an officer should always be by ballot. Ask for a ballot vote if you feel that the members are more likely to express their real opinion if the vote is secret.
Roll call – A roll call vote has the effect of placing on record how each member votes. It should not be used when members are not responsible to a constituency.
General Consent – When the chair knows that everyone is in favor or a motion she/he may say, "If there is no objection, we will dispense with…" or "If there is no objection, we will adopt…"
Bases for determining a voting result
Majority vote – The basic requirement for approval for action, except where a rule provides otherwise, is a majority vote. The term "majority" means "more than half," excluding blanks and abstentions. If 7 people vote "yes," 6 people vote "no" and 20 people abstain or don't vote, the motion still passes. If 5 people vote "yes" and 5 people vote "no," the motion fails.
Two-thirds vote – Two-thirds vote means at least two-thirds of the votes cast, excluding blanks and abstentions. Any motion which restricts the privileges of the members requires a two-thirds (2/3) vote; all others, a majority vote.

More Information – How to Debate a Motion

During debate, members must show respect for other members. Never attack another person.

DEBATE is talking about the good and bad points of a motion.

Remarks must be germane to the question before the group. This means you need to stick to the topic or issue.

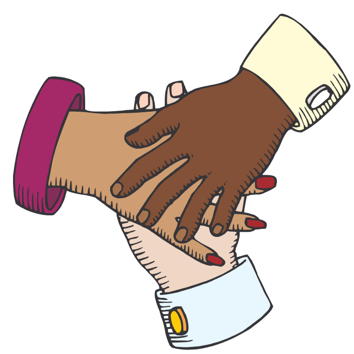
Thomas Jefferson's advice is still good: "No one is to disturb another in his speech by hissing, coughing, spitting, speaking or whispering to another, etc."

Note that more formal rules apply to large meetings, and even some boards and committees.

- A member may not speak until recognized by the chair.
- Remarks should be addressed through the chair.
- Speakers should stand when speaking.
- When no special rule relating to the length of speeches is adopted by the group, a member can speak no longer than ten minutes unless the consent of the group is obtained.
- Rights in debate are not transferable. A member cannot yield an unexpired portion of his/her time to another member (the chair controls who speaks) or reserve any portion of time for later.
- No member may be allowed to speak more than twice to the same question on the same day.
- If any member objects, a speaker has no right to read from or to have the secretary read from any paper or book as part of his/her speech, without permission of the assembly.

Another Way to Talk About a Motion in a Small Meeting

- You may want to use something like a **talking stick**.
- A talking stick is used by Native Americans to remind the group to listen to the person who is speaking.
- When a person holds the stick he or she is the only one talking.
- It's also a symbol that reminds the group of the rules.
- The stick starts with the President.
- When other members want to speak they can raise their hand to get the stick passed to them.
- Then, the Vice President passes the stick around to people who want to speak.



Brief Table of Motions

Parliamentary Action	Other notes
1. Main Motion This is the primary proposal before the Assembly. It is used to introduce new business	
2. Postpone Indefinitely Proposes that the Assembly does not wish to take a position on the main motion before it. It is in order only when the main motion itself is under consideration. No other motions, such as to amend or to refer, may be on the floor.	Not Amendable
3. Amend This changes the motion before the Assembly. Be sure to state exactly what is to be added, deleted, or substituted with precise wording. It helps if written copy is given to the secretary.	
4. Refer (Also called "commit.") If the assembly thinks that it does not have adequate information, or if excessive time is needed to refine the motion, it may be referred to a particular group for this work. The motion to refer should clearly state two things: (a). the person or group to which it is referred; and (b) what that group is to do: report back at a certain time, act as it sees fit within specified limits, or act or not act as it feels is wisest.	Debate is limited to advisability and details of referral
5. Postpone to a Certain Time This can be done for three purposes: a. time to develop support; b. time to develop more information; c. to take up another matter before present business.	
6. Limit or Extend Limits of Debate Any limit can be set on the length of speeches, the number of speakers permitted, or the total time of discussion. This is used when there are abuses or when time is short and there are other matters to deal with.	Not Debatable Requires 2/3 vote.
7. Previous Question This stops debate and calls for an immediate vote. The Chair is justified in ruling it out of order until both sides have been well expressed. When the discussion begins to be repetitive it can be helpful. Specify the motions to which previous questions apply.	Not Debatable. Not Amendable. Requires 2/3 vote
8. Lay on the Table Has the effect of setting the matter aside temporarily because something more urgent has come up. Matters laid on the table remain there until taken from the table. Any matters on the table at the end of the Assembly die. It is not in order to table an item to defeat it.	Not Debatable. Not Amendable
9. Question of Privilege This takes precedence over all other matters to enable a delegate to deal with a problem of (a) comfort, (b) safety, (c) courtesy, (d) effective working of the assembly. It is out of order to mention any other issue after using this emergency measure to gain the floor.	No second required. Not Debatable. Not Amendable. Requires chair approval, not voted on.

10. Object to Consideration This is appropriate only when it is thought that discussion would bring disrepute, embarrassment, or unwarranted divisiveness to the assembly or a member. If you are merely opposed to a motion the proper procedure is to speak against it and seek to vote it down. This move must be made immediately after a question has been moved, seconded, and announced by the Chair, but before debate begins.	No second required. Not Debatable. Not Amendable. Requires 2/3 vote
11. Parliamentary Inquiry This is a question about parliamentary procedure in the action before the Assembly at the time. The Chair's answer is an opinion only and cannot be appealed..	No second required. Not Debatable. Not Amendable. Chair answers the question.
12. Point of Order This is appropriate if you think that business is progressing contrary to a. parliamentary rules of the Assembly, b. the organization's by-laws, or c. normal standards of courtesy or propriety.	No second required. Not Debatable. Not Amendable. Chair rules
13. Appeal If you think the Chair has ruled incorrectly on a matter, you can appeal to the Assembly. The Chair has the right to enter into the debate on the appeal.	Debatable if applied to a debatable issue. Not Amendable.
14. Division of the Assembly This is a call for a recount with a standing vote. It must be moved before another motion is announced by the Chair.	No second required. Chair takes the recount if someone requests it.
15. Request for Information Use when you wish to speak to a report or need additional clarification or information in order to make an informed decision. Do not use this request to debate an issue.	Not Debatable. Not Amendable. Chair designates someone to answer
16. Reconsider Brings before the assembly a motion that has previously been acted upon. Can be moved only by a person who previously voted on the prevailing side. Seconder can have voted either way. Can be raised only on the same meeting or the meeting following original vote.	Debatable if the original motion was. Not Amendable
17. Suspend the Rules If you think parliamentary or administrative rule of the Assembly interferes with the progress of business, you can move to suspend the rule. Examples might be to change time of meeting, suspend rule of alternates, or give an honored person the floor. Bylaws cannot be amended this way.	Not Debatable. Not Amendable. Requires 2/3 vote
18. Division of the Question If there are two or more items in a motion that can be accepted or rejected individually, this motion can be used. If it passes, the question will be voted on by its divisible parts, not as a whole.	Not Debatable
19. Take from the Table Brings before the assembly a previously tabled motion. A question laid on the table stays there until taken from the table or until the end of the next regular meeting. If not taken up by that time, the question dies.	Not Debatable. Not Amendable

Coalition Building[8]

This is one section of a larger manual called, "Lead On: A Handbook to Starting a Student Organization." For more information or to obtain a copy of the manual, call Connections for Community Leadership at 1-866-532-2669.

What is a Coalition?

A coalition is a group of individuals and/or organizations with a common interest that decide to work together for a common goal. That goal could be as narrow as obtaining funding for a specific event, or as broad as trying to improve the overall quality of life for most people in the community. By the same token, the individuals and organizations involved might be drawn from a narrow area of interest, or might include representatives of nearly every segment of the community, depending upon the breadth of the issue. Coalitions may be loose associations in which members work for a short time to achieve a specific goal, and then disband. They may also become organizations in themselves, with governing bodies, particular community responsibilities, and funding. Regardless of their size and structure, they exist to create and/or support efforts to reach a particular set of goals.

Get started building a coalition by registering your student group with CONNECT you can be connected to student groups across the state of Michigan.

Why Build a Coalition?

There are a number of reasons why joining or developing a coalition might be a good idea. In general terms, it can concentrate the community's focus on a particular problem, create alliances among those who might not normally work together, and keep the community's approach to issues consistent. In addition, forming coalitions with other groups of similar values, interests, and goals allows members to combine their resources and become more powerful than when they each acted alone. At the same time, coalition members do not need to agree on everything; rather they need one common issue to focus on allowing them to work together despite differences. Some more specific reasons for forming a coalition might include:

- *To pool resources.* A number of organizations and individuals together may have the resources to accomplish a task that none of them could have done singly. In general, people and organizations join coalitions to do just that – to accomplish together what they cannot alone.
- *To empower elements of the community - or the community as a whole - to take control of its future.* This may mean addressing the place of youth in the community, for instance, or looking at economic development in light of globalization and community resources.
- *To actually obtain or provide services.* It may take a coalition - either initially or over the long term - to design, obtain funding for, and/or run a needed intervention in the community.

[8] A majority of this section was taken from the Community Toolbox at the University of Kansas - http://ctb.ku.edu/tools/en/tools_toc.htm.

- *To bring about more effective and efficient delivery of programs and eliminate any unnecessary duplication of effort.* Gathering all the players involved in a particular issue can result in a more cohesive and comprehensive intervention. Rather than duplicating their efforts, organizations can split up or coordinate responsibilities in ways that afford more participants access to programs and allow for a greater variety of services.
- *To increase communication among groups and break down stereotypes.* Bringing together groups and individuals from many sectors of the community can create alliances where there was little contact before. Working together toward common goals can help people break down barriers and preconceptions, and learn to trust one another.
- *To revitalize the sagging energies of members of groups who are trying to do too much alone.* A coalition can help to bolster efforts around an issue. For people who've worked too long in a vacuum, the addition of other hands to the task can be a tremendous source of new energy and hope.
- *To plan and launch community-wide initiatives on a variety of issues.* In addition to addressing immediately pressing issues or promoting or providing services, coalitions can serve to unify efforts around long-term campaigns in such areas as smoking cessation, community economic development, or environmental preservation.
- *To develop and use political clout to gain services or other benefits for the community.* A unified community coalition can advocate for the area more effectively than a number of disparate groups and individuals working alone. In addition, a wide-ranging coalition can bring to bear political pressure from all sectors of the community, and wield a large amount of political power.
- *To create long-term, permanent social change.* Real change usually takes place over a period of time through people gaining trust, sharing ideas, and getting beyond their preconceptions to the real issues underlying community needs. A coalition, with its structure of cooperation among diverse groups and individuals and its problem-solving focus, can ease and sometimes accelerate the process of change in a community.
- *To address an urgent situation.*

Benefits of Starting a Coalition

The benefits of coalition building go beyond increased power in relation to the opposition. Coalition building may also strengthen the members internally, enabling them to be more effective in other arenas. Some other key advantages to coalition building include:

- A coalition of organizations can win on more fronts than a single organization working alone and increase the potential for success.
- A coalition can bring more expertise and resources to bear on complex issues, where the technical or personnel resources of any one organization would not be sufficient.
- A coalition can develop new leaders. As experienced group leaders step forward to lead the coalition, openings are created for new leaders in the individual groups. The new, emerging leadership strengthens the groups and the coalition.
- A coalition will increase the impact of each organization's effort. Involvement in a coalition means there are more people who have a better understanding of your issues and more people advocating for your side.

- A coalition will increase available resources. Not only will physical and financial resources be increased, but each group will gain access to the contacts, connections, and relationships established by other groups.
- A coalition may raise its members' public profiles by broadening the range of groups involved in a conflict. The activities of a coalition are likely to receive more media attention than those of any individual organization.
- A coalition can build a lasting base for change. Once groups unite, each group's vision of change broadens and it becomes more difficult for opposition groups to disregard the coalition's efforts as dismissible or as special interests.
- A successful coalition is made up of people who have never worked together before. Coming from diverse backgrounds and different viewpoints, they have to figure out how to respect each other's differences and get something big accomplished. They have to figure out how each group and its representatives can make their different but valuable contributions to the overall strategy for change. This helps avoid duplication of efforts and improve communication among key players.

How to Start a Coalition

1. Put together a core group. You're probably already not alone in your concerns about the issue at hand, and you may already have a core group - a few individuals or organizations - ready to work at forming a coalition. If not, your first step is to find and make contact with those few individuals and organizations most involved with the issue.

Some reasons why a core group, rather than an individual, should lead the effort:

- A core group will have more contacts and more knowledge of the community than a single individual.
- It will give the idea of a coalition more standing among potential members.
- It will make finding and reaching potential members a much faster process.
- A core group will make the task easier on all the individuals involved, and therefore more likely to get done.
- It shows that the effort has wide support.

There are a few ways to approach assembling a core group:

- *Start with people you know.* If you're a longtime activist on this issue, or if you've been living or working in your community for a while, you have lots of contacts, particularly among others concerned with the same things you are. Use those contacts now, either to pull them into the circle, or to get the names of others who might be part of a core group. Someone who knows you - assuming you have a positive relationship - is usually more easily persuaded than someone who doesn't.
- *Contact people in other student organizations, agencies, and institutions most affected by the issue.*
- *Talk to influential people or people with lots of contacts.*

2. **Identify the most important potential coalition members.** Especially if your coalition has a narrow and time-limited purpose, there are probably people or organizations you can't do without. It's important to identify them and to target them specifically for membership. There may be a specific person among the target population, or a particular college/university official, without whom nothing can get done. The chances are you - and if not you, then other members of the core group - know this person, or at least know who she is, and have some connection to her.

3. **Recruit members to the coalition.** Now that your core group is in place, and you've decided on the potential members who are necessary to the success of the coalition, you can start recruiting members. Although it's important to start with the individuals and groups mentioned above, you'll probably want to be as inclusive as possible. It's unusual to hear about a coalition suffering because it has too many members.

Use the networking capacity of your core group to the fullest. The core group can brainstorm a list of possible members, in addition to those deemed essential. Then each member can identify individuals on the list whom he knows personally, or organizations where he has a personal contact. If there are names left on the list without a contact, they can be divided among the members of the core group.

There are a number of ways to contact people and organizations, including:

- Face-to-face meetings
- Phone calls
- E-mail
- Personal letters
- Mass mailings
- Public Service Announcements or ads in the media
- Flyers and posters

Be sure to ask those you talk to for suggestions about other potential members, and try to have them make the contact. That will spread out the work and also give the invitation more credibility, since it comes from someone the contacted person knows. If you are successful, you could end up contacting and recruiting several times the number of people and organizations on your original list.

4. **Plan and hold a first meeting.** The first meeting of a coalition is important. If it's a high-energy, optimistic gathering that gets people excited, you're off to a good start. If it's depressed and negative, or just boring, it's a good bet that a lot of people won't come back. It's up to the core group - in what may be the last official task they undertake - to plan a meeting that will start the coalition off on the right foot.

There are a number of possibilities for the content of the first meeting. The agenda should depend on your particular issue and purposes, and on the needs of your community, but you'll probably want to include some of the following:

- *Introductions all around.* Everyone present should give a brief statement of who they are, the organization, if any, they're connected with, and the nature of their interest in the issue.
- *Start defining the issue or problem around which the coalition has come together.* This might mean the group coming up with an actual statement, or it might entail an initial discussion, followed by a small group being asked to draft a possible definition for the next meeting.
- *Discuss the structure of the coalition.* What kind of group will it be, how (if at all) will it be run, what kinds of things will it actually do?
- *At least start the process of creating a common vision and agreeing on shared values about the direction of the coalition.* This is the first step toward developing the vision and mission statements that will define the coalition and guide its work.
- *Discuss a procedure for forming an action plan.* Again, this may result in an actual, or at least a preliminary plan, or it may lead either to the appointment of a smaller group to draft a plan, or to the establishment of a procedure by which the larger group will generate a plan over a set period of time.
- *Review the things to be done before the next meeting and who has agreed to do them.* As mentioned above, it's important that people leave the first meeting feeling that something has been accomplished. If there are tasks being worked on and specific results expected at the next meeting - even if those results are simply statements or preliminary plans to react to - coalition members will have that feeling.
- *Schedule at least the next meeting.* It may be possible to develop a regular meeting schedule at this first meeting, or it may make more sense to schedule only the next meeting and wait until the membership stabilizes and some other people join before creating a long-term schedule.

5. **Follow up on the first meeting.** You've held a successful first meeting - terrific! The job of building a coalition has only begun, however. First, you have to follow up to make sure that there will be a well-attended second meeting at which work can continue.

- *Distribute the minutes of the first meeting and reminders about the next meeting to those who attended, and send them out with invitations to potential new members as well.* Try to widen your net as much as possible. Get to the folks you missed the first time, or to those whose names you've gotten from people who attended the first meeting.
- *Follow up on the groups or individuals who are working on tasks assigned at the first meeting.* Offer help, attend meetings, try to involve other people with relevant skills or knowledge - do everything you can to make sure those tasks get accomplished.
- *If there are committees or task forces forming, try to recruit new members for them.* The real work of the coalition will probably be done in these small groups, so it's important that they have the right members. If you know people with expertise that could be used in particular ways, grab them. Most people will respond if they're asked, especially if they're asked because you value what they bring to the task.
- *Keep looking for new coalition members.*
- *Keep track of the fundamental building blocks of the coalition that aren't in place yet.* If the group hasn't yet decided on a structure or a coordinating body, you need to

make sure that the decision doesn't get pushed aside, but that it's either in the works or being actively considered. If there's no action on an action plan, you need to provide the push to get it going.

6. **Next steps.** There are a number of specific things - some of which you've already started in that first meeting - that need to be done to make sure that the coalition keeps moving forward.

- *Gather information.* In order to plan for action, you need as much information about the problem or issue - and about the community - as possible. Many organizations, particularly those most involved with the issue at hand, are likely to have statistics or other info on hand. The U.S. Census can be a good source of demographic information, as can local colleges or universities and local government departments. The more information you can gather, the easier it becomes to define the problem, to know if you're addressing something that's actually a major community issue, and to plan a strategy that will address it effectively.
- *Finish creating vision and mission statements.* These can be hashed out in a small group after everyone has had input in a larger meeting, or you can actually try to generate them in the larger group itself (perhaps by splitting people up into smaller groups, then coming back together to reconcile differences). It's important that there be agreement on the wording and intent of these statements because they will be the foundation of the coalition, referred to again and again over time as the group tries to decide whether to tackle particular issues. Everyone has to feel ownership of them if the coalition is to develop an identity.
- *Complete an action plan.* The coalition's action plan is intertwined with both its structure and its vision and mission. In practice, coalitions often start with a sense of what they need to do, and their structures, visions, and missions grow from that.
- *Finish the work of designing a structure for the coalition.* Again, this has to be a shared task, with everyone having a chance to contribute ideas. There is such a broad range of possibilities here - from practically no governance to a very clear, formal hierarchy - that it's crucial that the group come up with a form that everyone can live with. Once a structure has been agreed upon, there may still be the need for writing bylaws and otherwise formalizing it.
- *Elect officers, or a coordinating or steering committee.* Once there's agreement about the structure of the coalition, it's time for members to decide whether they want some sort of governing body, and to choose it so that the work of the coalition can go ahead.
- *Determine what other resources - financial, material, informational, etc. - you need, develop a plan for getting them, and decide who's going to be responsible for carrying it out.* If you already have funding for a paid staff person, finding resources may be one of her primary responsibilities...or it may not. A committee of the coalition may have that responsibility, or someone may simply take it on. Part of creating a strategic plan that encompasses your vision, mission, and action plan is looking at the resources you'll need to reach your goals and planning for obtaining those resources.
- *Start the hard work of maintaining the coalition over time.* Once your coalition is a going concern, it still needs care and feeding. After it's been around for a while and had some success, people may start to take it for granted, or the original members may start to

burn out or to get stale. Careful maintenance for the long term is an extremely important task.

7. **Some general guidelines for getting a coalition off the ground.** In addition to the specifics above, there are some more general elements to starting a coalition:

- *Communicate, communicate, communicate.* Make sure that lines of communication within the coalition and among the coalition, the media, the college/university, and the community are wide open. Open communication will assure that no one feels left out of the loop, and that everyone has the information necessary to make coalition efforts successful. Good communication with the media and the community will increase your chances for publicity and support when you need them.
- *Be as inclusive and participatory as you can.* Work at making the coalition a group in which anyone in the community will feel welcome, and continue to invite people to join after the first meeting. Try to involve everyone in the coalition in generating vision and mission statements, planning, and major decisions. The more people that feel ownership of the coalition itself, the harder they'll be willing to work to achieve its goals, and the less likely they'll be to allow turf issues or minor conflicts to get in the way of the coalition's progress.
- *Network like crazy.* Try to involve, or at least to keep informed, as many other groups in the community as possible. Let them know what you're doing, invite them to coalition meetings (to make presentations, if appropriate, or just to see what's going on), invite them to join if they're interested, educate them about the issue. If groups in the community are informed about your work, they're more likely to be supportive, and to tell others about what you're doing as well. They may also have better connections to policy makers and/or college/university officials than you have, and may be able to help you approach them.
- *Try, at least at the beginning, to set concrete, reachable goals.* Success is great glue - achieving reachable goals early can help a coalition develop the strength to later spend the years it may take to pursue and achieve long-term goals.
- *Be creative about meetings.* Community activists often feel that they spend their whole lives in meetings. If each coalition meeting can be different, and have some elements of fun to it, you'll be much more likely to retain both membership and interest in the coalition. Some possibilities include rotating the responsibility for meetings among the groups comprising the coalition; having only a small number of meetings a year, each with a particular theme, and doing most of the work of the coalition in committees or task forces; or regularly bringing in exciting presentations on the issue or in areas that relate to it.
- *Be realistic, and keep your promises.* If you're not sure you can do it, don't say you will. If you say you will, be sure you do.
- *Acknowledge diversity among your members, and among their ideas and beliefs.* Your coalition will probably mirror the cultural, economic, racial, ethnic, and religious diversity of your community, and will certainly represent a diversity of opinion. Not everyone will agree with everything the coalition does or wants to do, and sometimes the minority opinion will be right. Make sure to take everyone's

opinion and restraints into account, and to use diversity as a spur to discussion, rather than a source of division.

- *Praise and reward outstanding contributions and celebrate your successes.* In addition to success itself, the celebration of success is a great way to cement the bonds among members of a coalition. Whether through individual or group awards, or through parties or other events, celebration of achievement will help your coalition thrive, and will give you a much-needed opportunity to remember that there's a reason you're doing all this.

Guidelines to Building a Successful Coalition

1) **Choose unifying issues.** The most effective coalitions come together around a common issue. Make sure the development of group goals is a joint process, rather than one or two group representatives deciding the goals and then inviting others to join.
2) **Understand and respect each group's self interest.** There must be a balance between the goals and needs of the coalition and of the individual organizations.
3) **Respect each group's internal process.** It is important to understand and respect the differences among groups. These differences are often apparent in processes or chains of command for decision-making. Make a commitment to learning about the unique values, history, interests, structure, and agenda of the other groups and organizations.
4) **Agree to disagree.**
5) **Structure decision-making carefully.**
6) **Distribute credit fairly.** Recognize that contributions vary. Appreciate different contributions. Each organization will have something different to offer. Each one is important, so be sure to acknowledge them all, whether they be volunteers, meeting space, funding, copying, publicity, leafleting, passing resolutions, or other resources.
7) **Give and take.** It is important to build on existing relationships and connections with other organizations. Don't just ask for or expect support; be prepared to give it.
8) **Develop a common strategy.** The strength of a coalition is in its unity. Work together with other organizations to develop a strategy that makes sense for everyone. The tactics you choose should be ones that all the organizations can endorse. If not, the tactics should be taken by individual organizations independent of the coalition.
9) **Be strategic.** Building coalitions in and of themselves requires a good strategy. Which organizations you ask, who asks them, in which order to ask them are all questions to figure out.
10) **To ensure consistency, send the same representative to each coalition meeting.** This helps meetings run more smoothly. These individuals should also be decision-making members of the organizations they represent.
11) **Formalize your coalition.** It is best to make explicit agreements. Make sure everyone understands what their responsibilities and rights are. Being clear can help prevent conflicts.

Barriers to Starting a Coalition

There are often barriers to starting a coalition, and it's important to be aware of and anticipate them, because they may dictate the process the coalition will have to follow in order to begin successfully. Among the most likely:

- **Turf issues.** Organizations are often very sensitive about sharing their work, their target populations, and especially their funding. Part of the work of starting a coalition may be to convince a number of organizations that working together will in fact both benefit all of them and better address their common issues.
- **Bad history.** Organizations, individuals, or the community as a whole may have had experiences in the past that have convinced them that working with certain others - or working together at all - is simply not possible. A new coalition may have to contend with this history before it can actually start the work it needs to do.
- **Minimal organizational capacity.** It might be necessary to find a coordinator, or for one or more individuals or organizations to find a way to share the burden of organization for the new group if it is to develop beyond - or as far as - a first meeting.
- **Funding.** The difficulty of finding funding is an obvious obstacle. Less obvious are the dangers of available funding that pushes the coalition in the wrong direction or requires it to act too quickly to address the issue effectively. New coalitions have to be alert to funding possibilities from all quarters, and also have to be vigilant about the kind of funding they apply for and accept.
- **Failure to provide and create leadership within the coalition.** Coalitions demand a very special kind of collaborative leadership. If that leadership isn't available and can't be developed from within the coalition, its existence is probably at risk. It may be necessary to bring in an outside facilitator and/or training in collaborative leadership top salvage the situation.

The perceived - or actual - costs of working together outweigh the benefits for many coalition members. The task here may be to find ways to increase benefits and decrease costs for the individuals and organizations for whom this is the case if the coalition is to survive.